CITY OF GRAND RAPIDS

OpenForms: Standard Form Fields

OpenForms: Basic Functions

OpenForms: Digital Content Development

OpenForms: Building a Form

CoGR Governance: Web Content Style Guide/Digital Standards

OPENFORMS | STANDARD FORM FIELDS

OVERVIEW

·CONSISTENCY·
·USER EXPERIENCE·
·MINIMAL ERRORS·

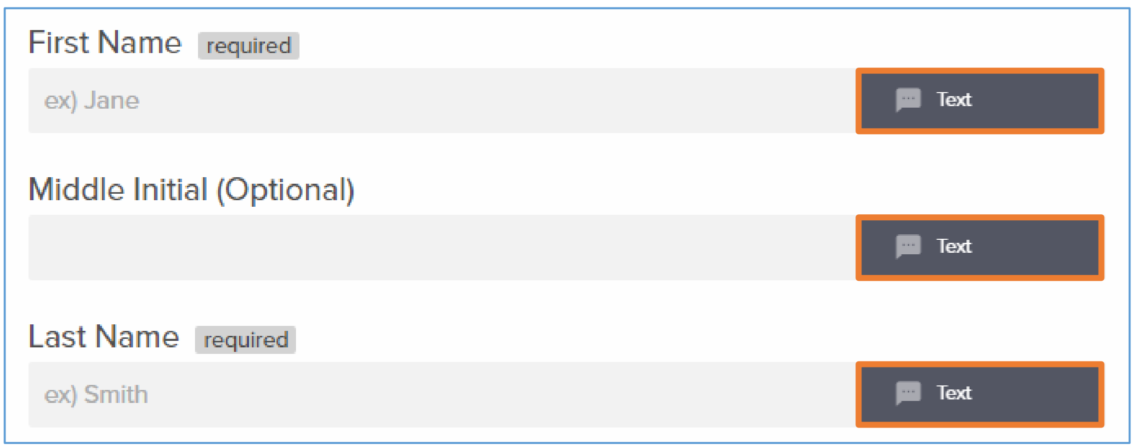
We need a standard format for form fields used across several departments for a few reasons:

- To create a consistent expectation for users and avoid confusion
- To create a better user experience, while minimizing errors.
- To minimize frustration for City staff when processing online form submissions.

NAME

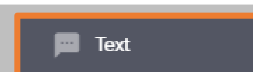
·SEPARATE FIRST & LAST·
·MIDDLE INITIAL OPTIONAL·

Splitting name into *first name* and *last name* fields eliminates the need for a user to type their own spaces, which could cause entry errors.



Note: any optional fields should be labeled in parentheses after the question title (see above).

Field Types



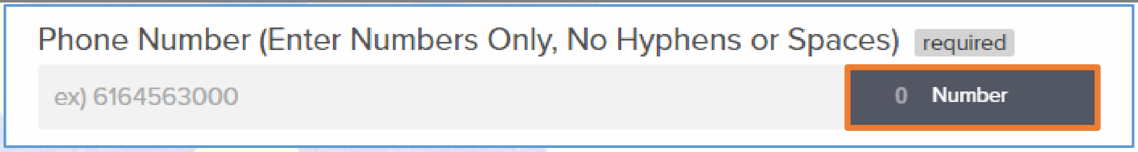
PHONE NUMBER

·NUMBER FIELD·
·NO HYPHENS OR PARENTHESES·

Using a number form field for Phone Number entry

- It sets a clear expectation for the customer.
- It helps City staff simplify the process of formatting long lists of numbers to send mass text messages.

OPENFORMS | STANDARD FORM FIELDS



Note: It's a good idea to give some instruction in the question title and provide a clear example of the format in the placeholder text.

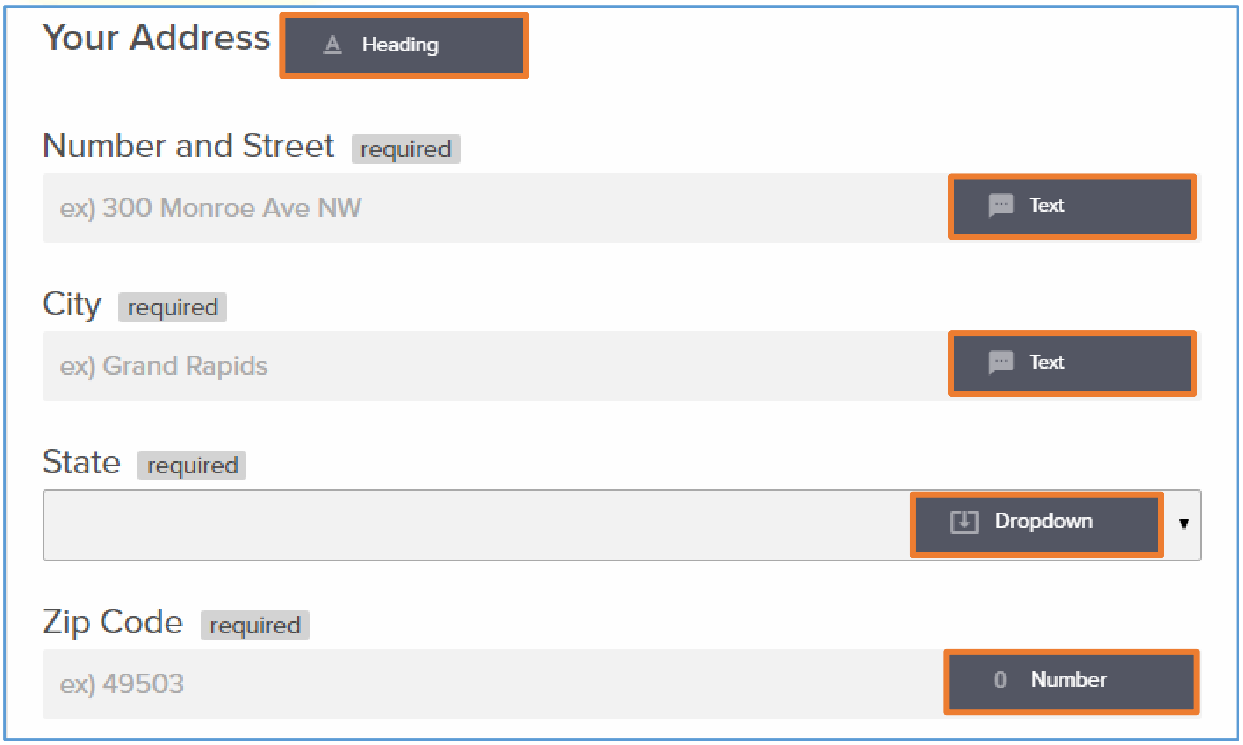
Field Types

ADDRESS

·SEPARATE FIELDS·
·NUMBER & STREET·
·CITY·
·STATE·
·ZIP CODE·

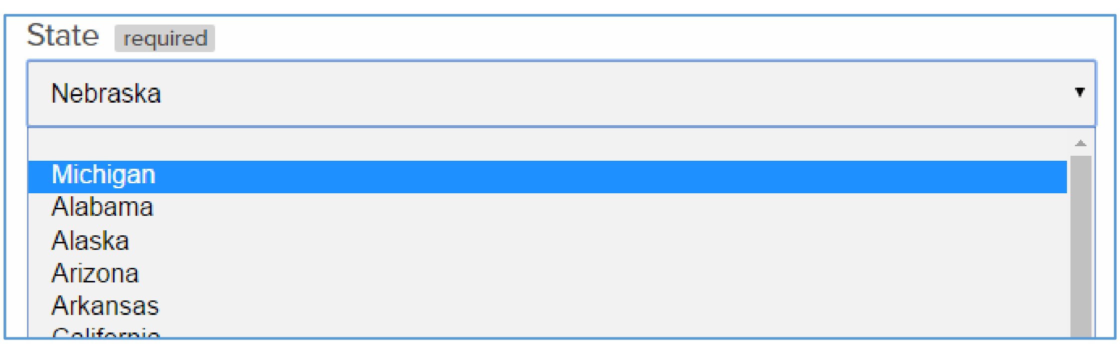
There are a few reasons to split the address field:

- It's less confusing for users, as it sets a clearer formatting expectation, minimizing entry errors
- It optimizes addresses for GIS analysis by City staff.

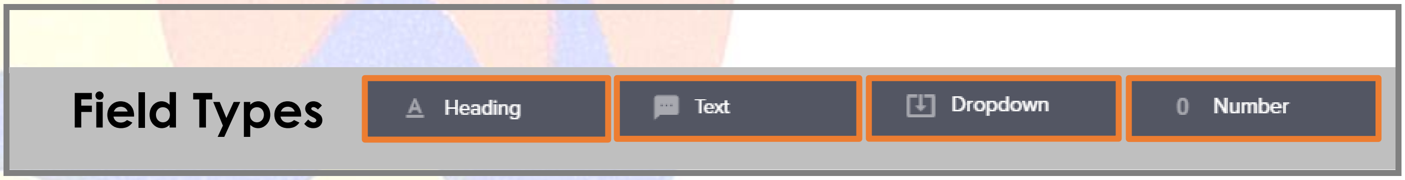


State Dropdown Field:

- State is a dropdown field with all 50 states entered as possible selections
- This helps avoid data entry errors, minimizing spelling errors and necessary staff data cleanup
- Michigan is checked as the default option. Uncheck to remove Michigan as the default



OPENFORMS | STANDARD FORM FIELDS



OPENFORMS FUNCTIONS OVERVIEW

OPENFORMS INTRODUCTION

OpenForms is a powerful tool for creating online forms. You will use OpenForms to make current paper and printable PDF forms into online *smart forms*. This tool gives you the flexibility to make forms that work for you *and* your customers.

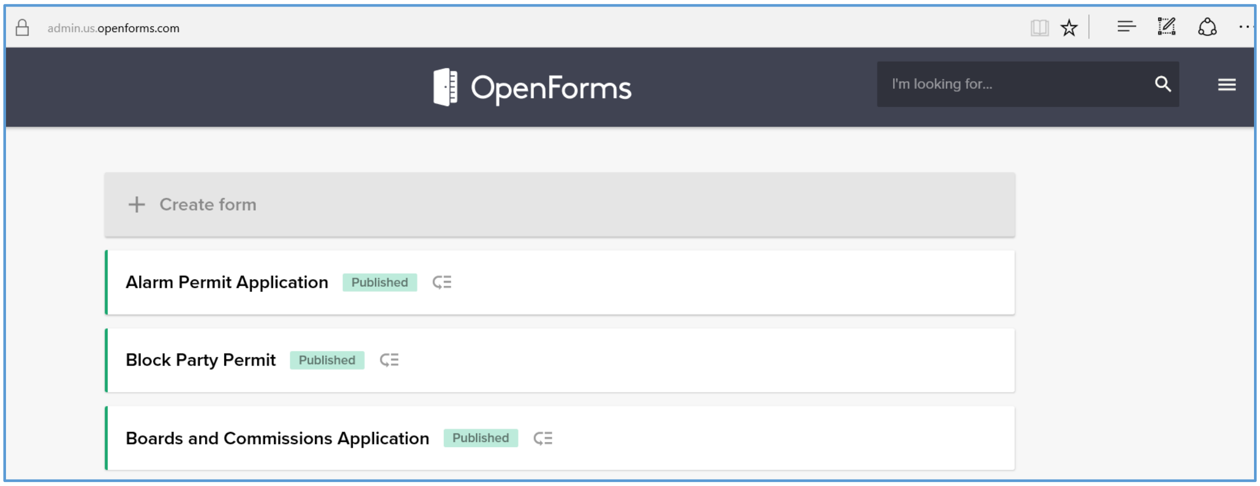
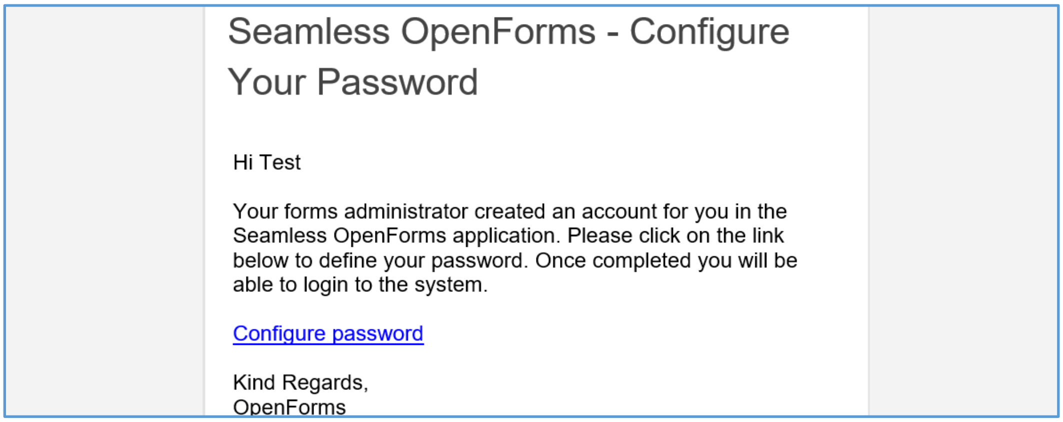


TABLE OF CONTENTS

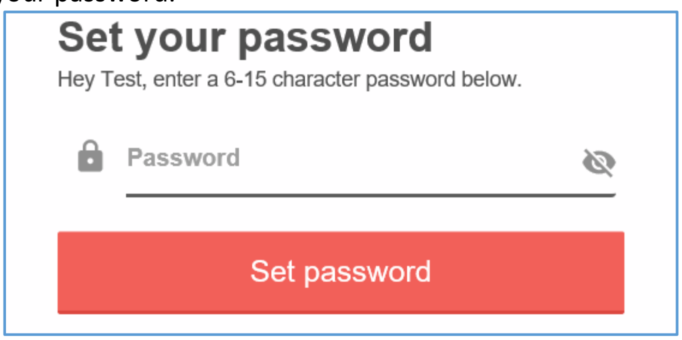
NAVIGATION

ACCESSING OPENFORMS

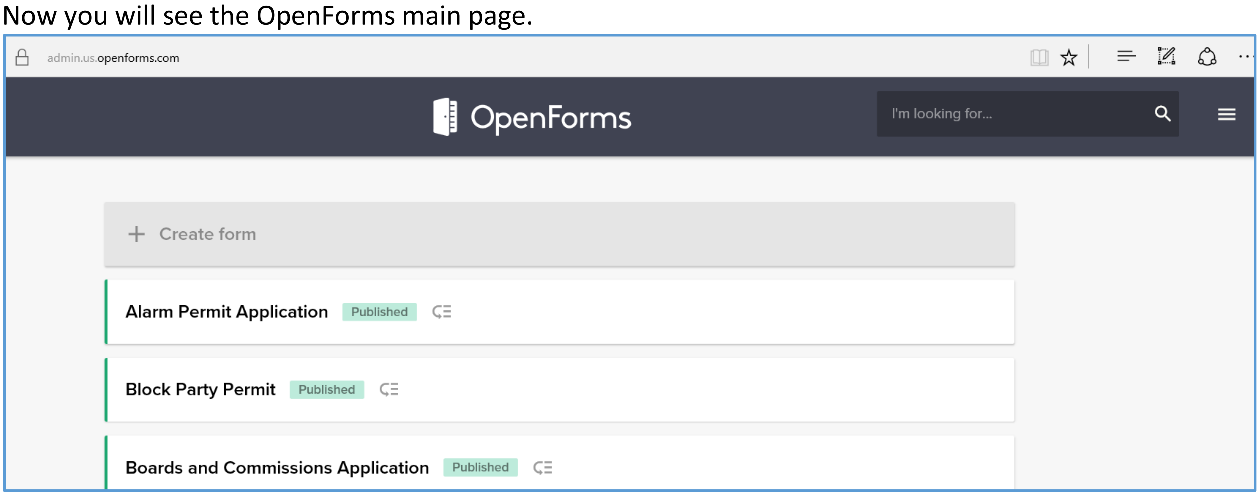
You do not access OpenForms in the OpenCities program. If you need access to OpenForms, you will get an email with a link to create a password. Your username will be the same as your City account



Follow the link and set your password.



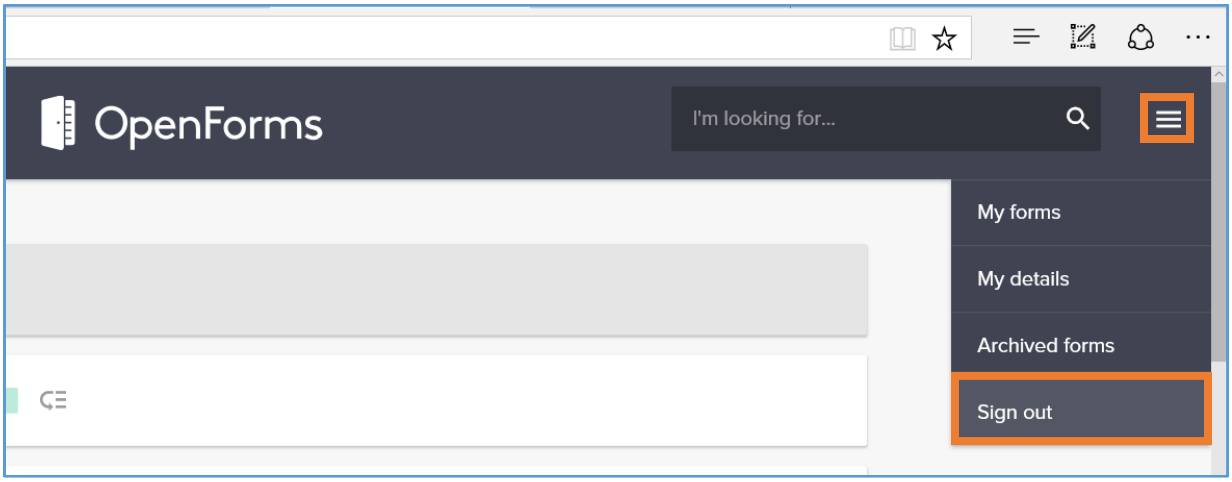
Now you will see the OpenForms main page.



SIGNING OUT

OpenForms automatically signs you out of your account after a period of inactivity. Closing your web browser also signs you out of your account.

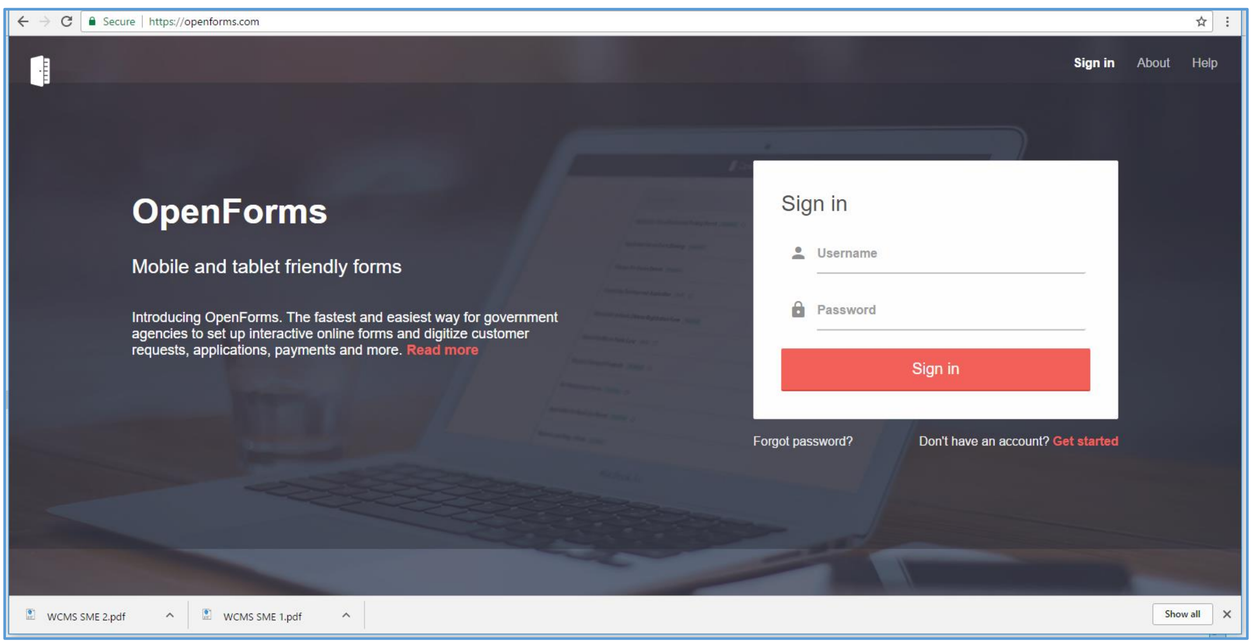
To sign out of your account manually, click the **MENU** icon, then click **SIGN OUT**.



RETURNING TO OPENFORMS

OpenForms is an internet-based software, so you do not download it to your computer.

After signing out, you can return to OpenForms by going to openforms.com and signing in with your username and password. You should bookmark this page if you plan to use OpenForms often.

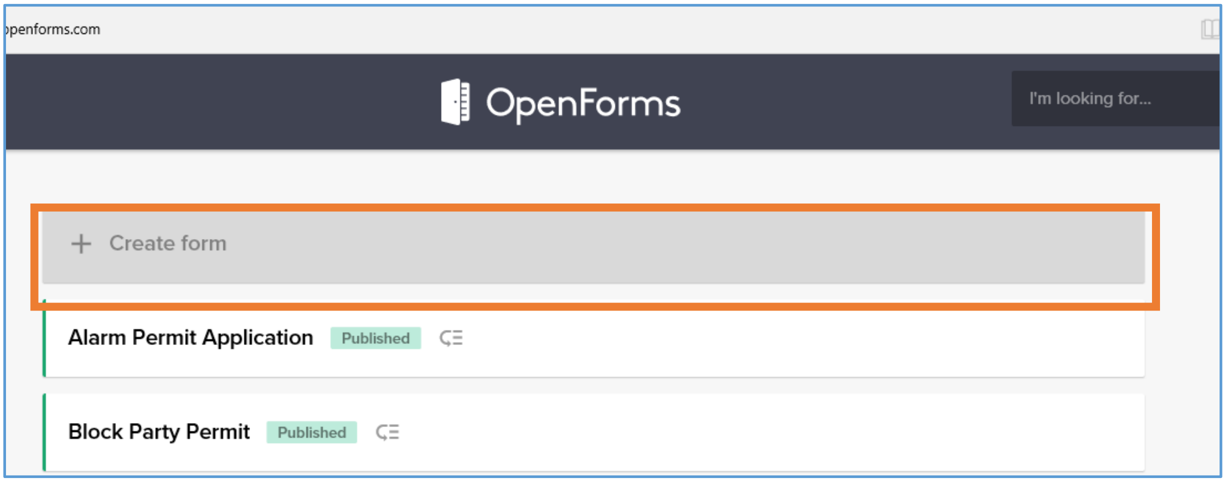


CREATING A NEW FORM

ADDING A NEW FORM

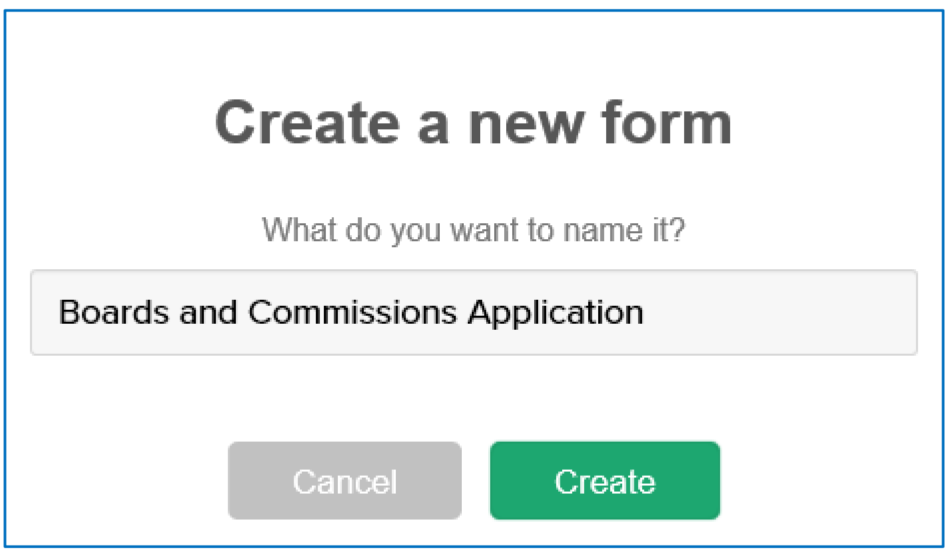
When you sign in, you will see a list of all of the forms created across all City departments. It is important that you edit only forms that you have created.

To create a new form, click **+ CREATE FORM** at the top of the list of forms.



NAMING A NEW FORM

Be sure to give your form a name that makes sense to our customers. When we publish the form to the website, *our customers will see the form name*.

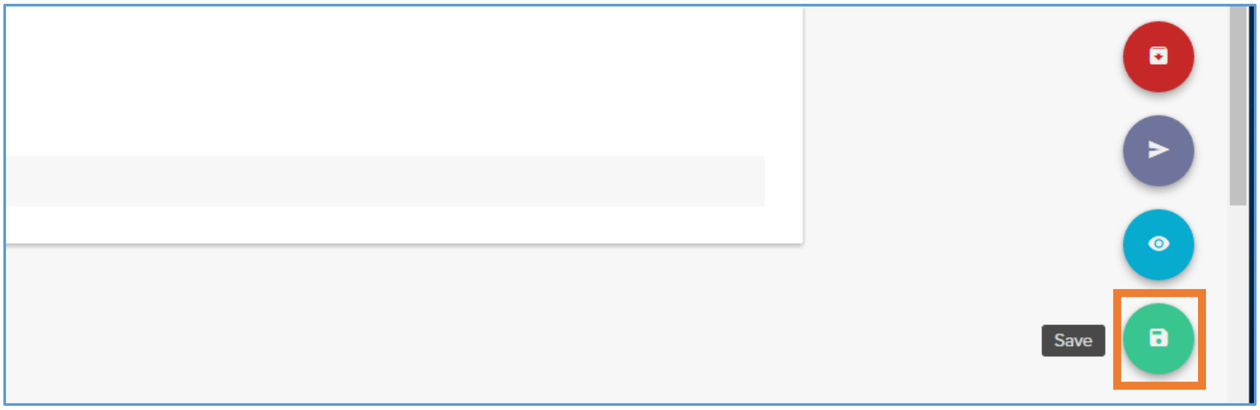


SAVING A FORM

After creating your form, you will see the form editing page.

Within the editing page, there are a few circular buttons in the bottom-right corner of the screen. See Saving, Previewing, Publishing, and Archiving for detailed descriptions of these buttons.

The **SAVE ICON** is the green button closest to the bottom of the page. You should use this button *a lot* as you are creating forms.



Note: OpenForms is a software that exists on the internet, not on your computer, so

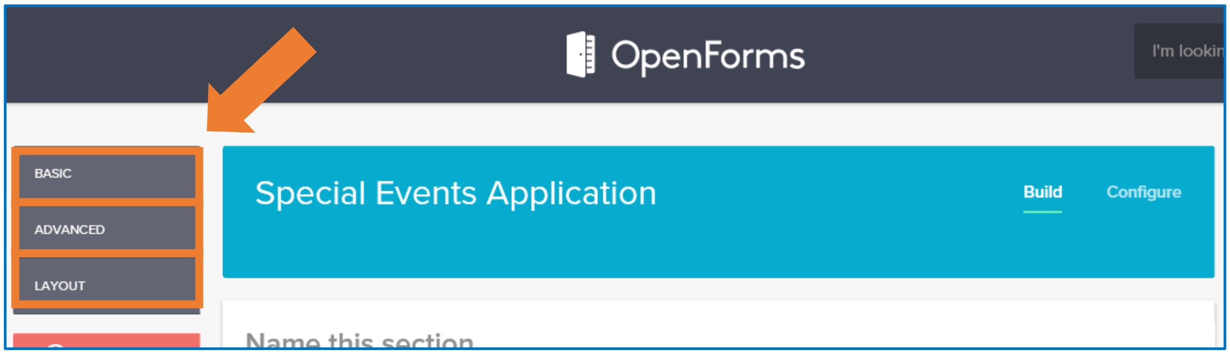
- You need to save often.
- There is no auto-recovery feature in case your computer freezes or crashes.
- The only way to make sure that you don't lose what you work on is to *save* and *save often*.

FORM FIELDS

WHAT ARE FORM FIELDS?

Form fields are any area of an internet form that customers enter text or numbers into. There are different types of form fields to make the data collected easier to analyze and group together. We'll talk more about this in the next section.

Form fields are divided into three categories: **BASIC**, **ADVANCED**, and **LAYOUT**. You can find them on the left side of the page when you are creating or editing a form.

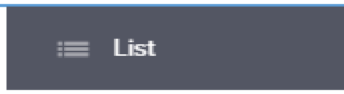


TYPES OF FORM FIELDS

The chart below shows each type of form field and how you should use it.

BASIC		
Icon	**Name**	**Use This When…**
Text	Text Field	There are no predetermined answers. Users can enter whatever they want
0 Number	Number Field	Only numbers could possibly be in the answer. Important in forms with calculations (discussed later).
Dropdown	Dropdown Selection	Customers need to choose *only one* answer from many possible.
Checkbox	Checkbox Selection	Customers can select *several* possible predetermined answers.
Radio button	Radio Button Selection	Customers can select *only one* of a few predetermined answers.
File upload	File Upload	Customers will need to upload an image or document.

Date	Date Field	Customers need to enter a date (like date of birth or today's date).
Email	Email Field	When you need to collect email addresses. This will make it easy to mass email customers.
ADVANCED		
Icon	**Name**	**Use This When…**
+2 Calculation	Calculated Field	You need to calculate a number based on numbers a customer previously entered (like total cost after taxes and fees).
Signature	Signature Field	You need to capture customers' signatures.
Payment	Payment Field	The customer needs to pay for services.
Radio matrix	Radio Button Matrix	You need to ask multiple questions with the same predetermined responses and only one answer can be selected. You will almost never use this field type.
Check matrix	Checkbox Matrix	You need to ask multiple questions with the same predetermined responses and multiple answers can be selected. You will almost never use this field type.
LAYOUT		
Icon	**Name**	**Use This When…**
Section	Add Section	You need to add a new section that will appear as another page.
Heading	Add Heading	You need to divide a section into subsections.
Paragraph	Paragraph Text	You need to give the customer detailed instructions/explanation.

	List of Text	You want to break down/simplify instructions or explanations.
	Add Image	You want to add a picture to your form for design or instruction reasons.
	Add Video	You want to add a video to your form for design or instruction reasons.

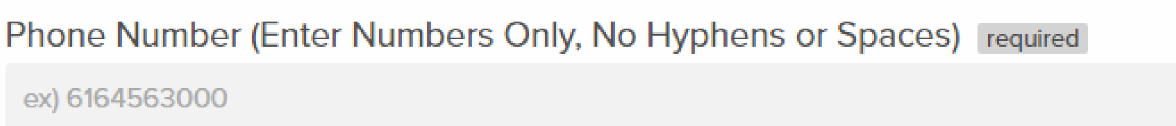
FORM FIELDS BEST PRACTICES

When using form fields, you should always try to give the customer a set of pre-selected possible answers to choose from. This won't always be possible, but a lot of the time it will.

Even if there are many possible answers, it's still a good idea to give customers a list to choose from. For example, the City has over 40 boards and commissions. Consider these points:

- You might think that on an application, we should let the customer type in the name of the board or commission they want to apply for.
- But if the customer misses a capitalization or a space – or if they spell the name wrong – it will take a lot more time to get the data in a format that we can sort in Excel or do any other analysis of.
- A dropdown list with all 40 board names works better in this case.

When you are asking customers to enter text without pre-selected options, it's a good idea to show them in the question or placeholder text how you would like the text entered (see examples below).



FORM SECTIONS

WHAT ARE FORM SECTIONS?

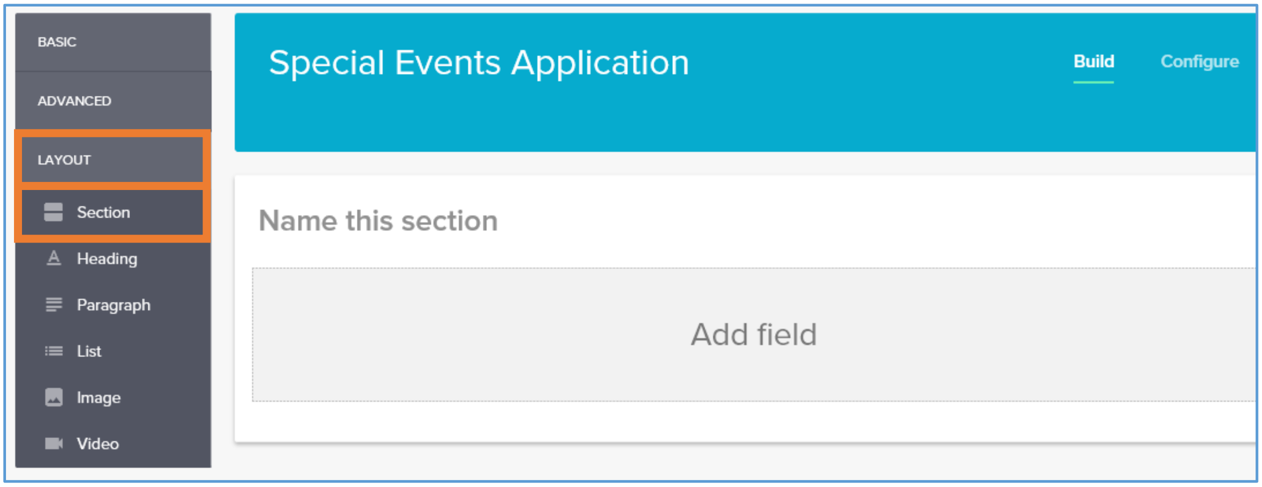
Form sections break up long forms into more manageable, smaller pages.

Divisions should make sense. For example, an application form could be split into sections:

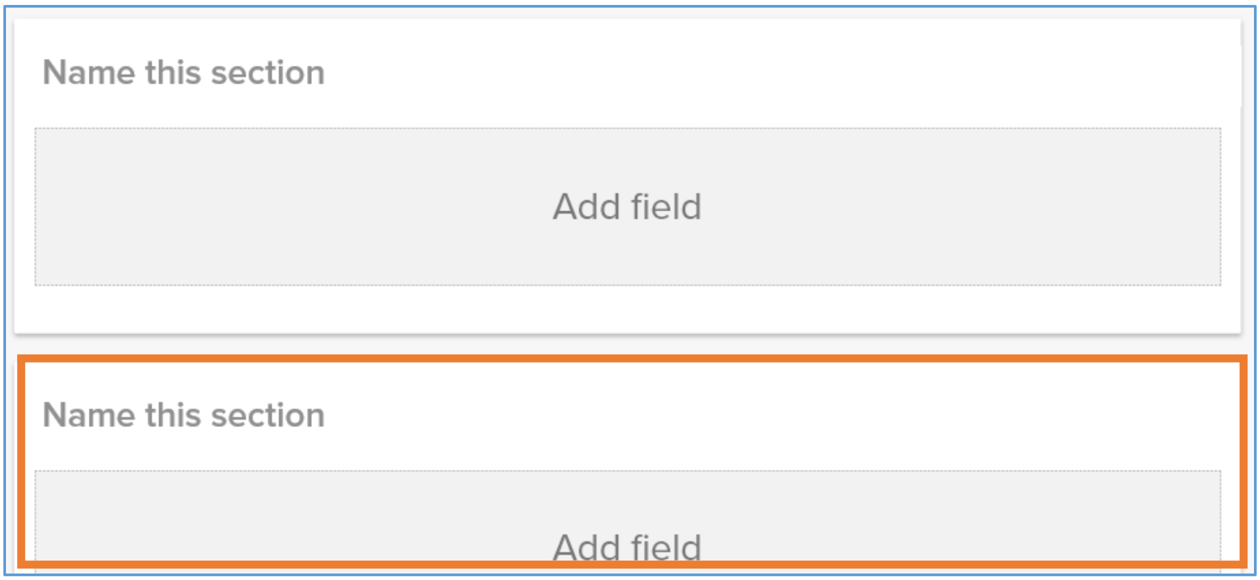
- Contact Information
- Employment Details
- Application Questions
- Signature Page

ADDING A SECTION

Form sections are a form field type found under the **LAYOUT** section of the form fields navigation bar.



Clicking **SECTION** will add a new section directly below the last section of the form.



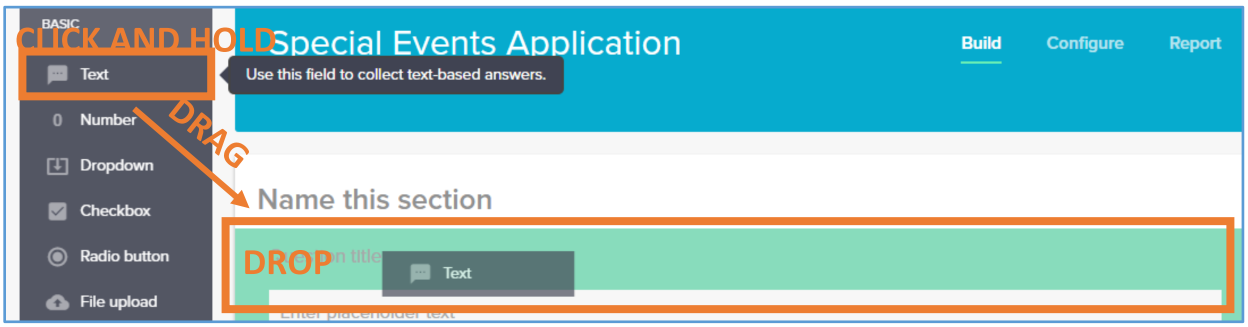
BUILDING FORMS

WHERE TO START

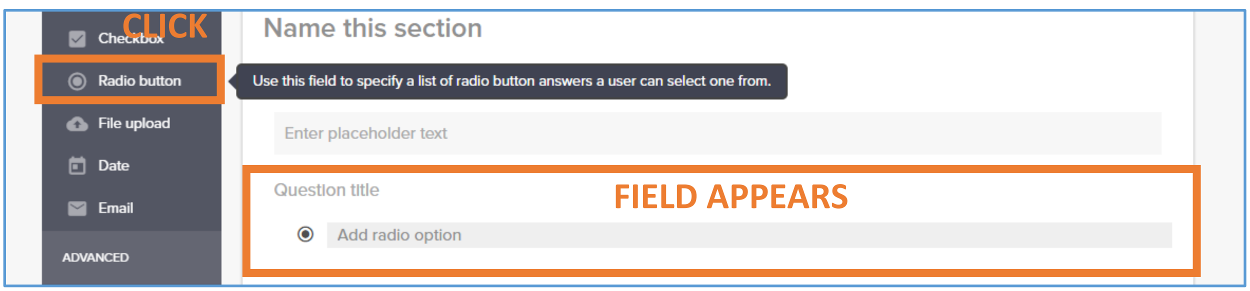
Building online smart forms always starts with good planning. These forms will rarely – likely never – work the same way that your current paper or fillable PDF form works.

ADDING FIELDS

The OpenForms tool is drag-and-drop. This means that you can click and hold any of the form field types on the left-side toolbar and drag that field type to any position on your form. When you release the mouse, the form field you dragged will drop right into place on the form.

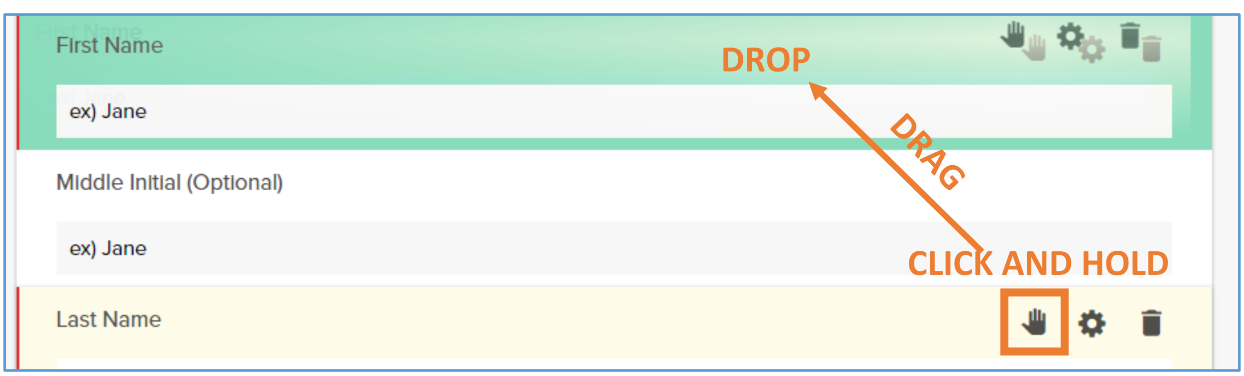


If you just click the form field you want to add, it will be added at the bottom of the form.



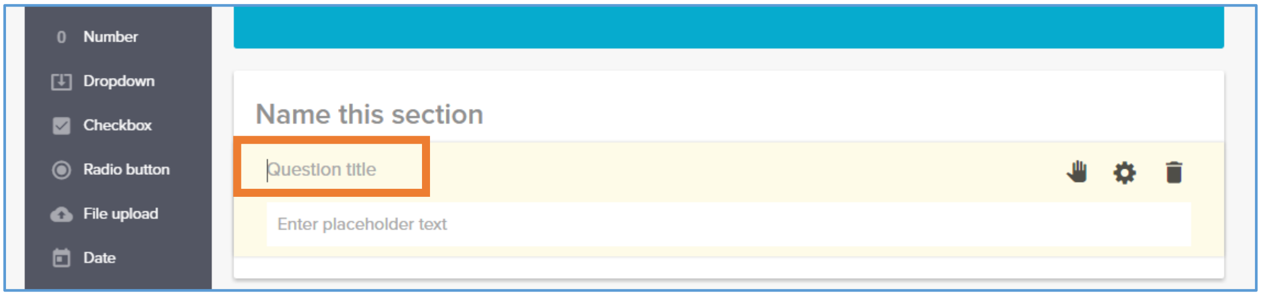
MOVING FIELDS

If you need to rearrange a field, hover over it and find the **HAND ICON**. Click the icon and hold, then drag the field to move it. Release to drop it into place.

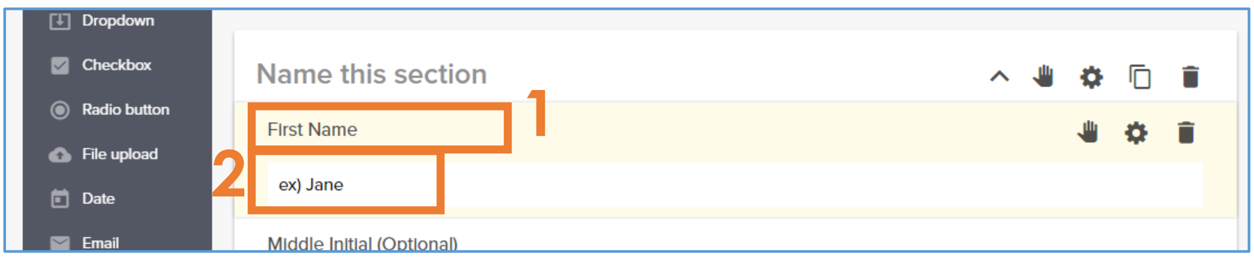


CUSTOMIZING FIELDS

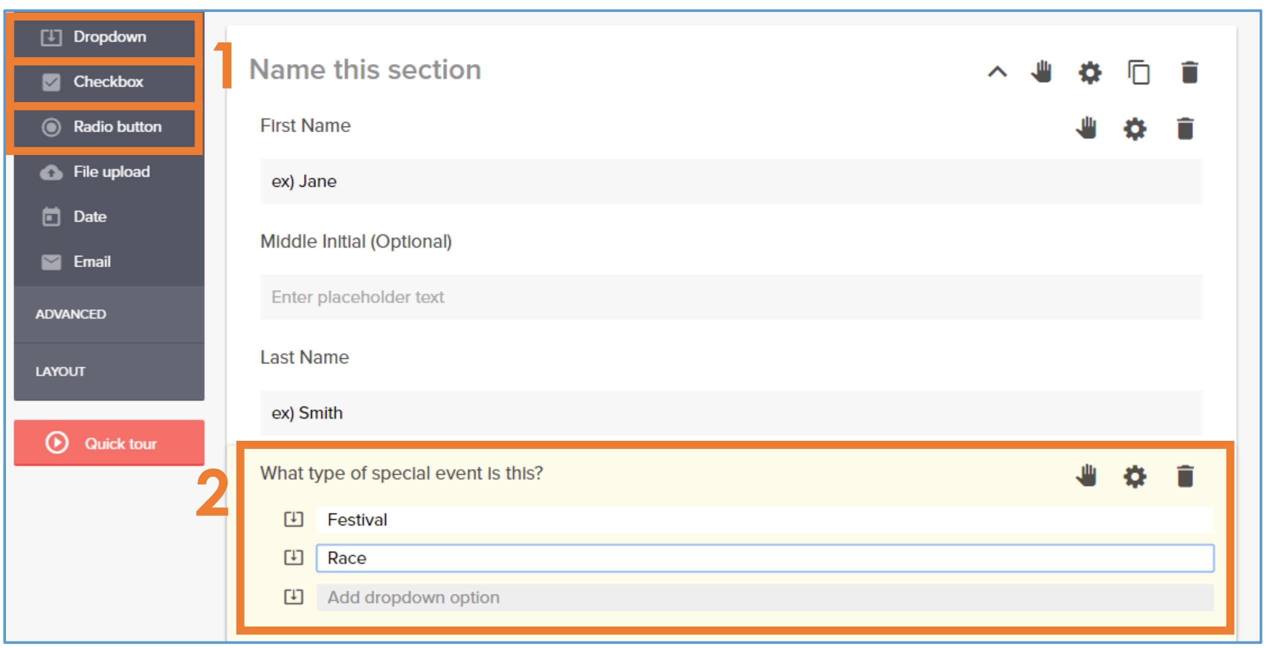
To change the form field title on the form, simply click on the text labeled **QUESTION TITLE**.



When the cursor appears, you can type your own text to change the **TITLE (1)**. You can change the **PLACEHOLDER TEXT (2)**, too. The placeholder gives customers an example of how they should enter the information you're asking for; it disappears when customers click to enter their own information.



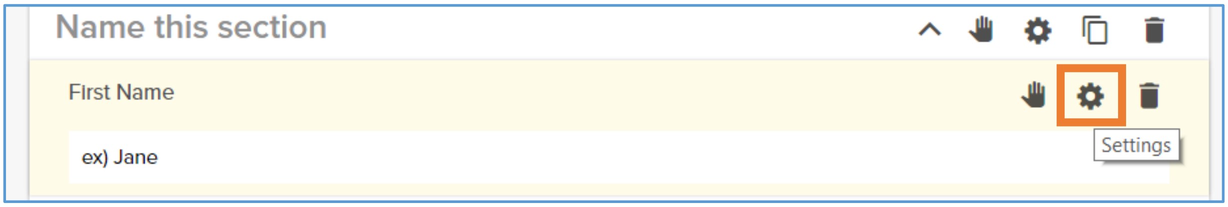
For **DROPDOWN**, **CHECKBOX**, and **RADIO BUTTON (1)** fields, you also need to add all **POSSIBLE SELECTIONS (2)** for the question/prompt you are asking for from the customer.



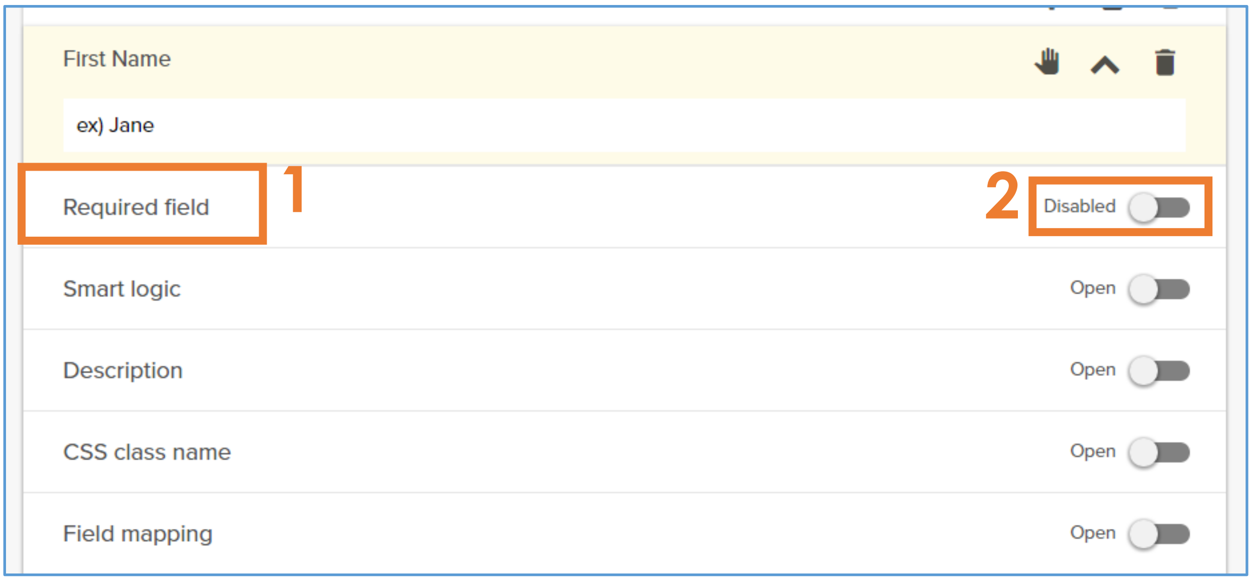
See Types of Form Fields for tips on how and when to use specific form fields.

MAKING A FIELD REQUIRED

Hover over the form field you need to make required and click on the **SETTINGS ICON**.



From the settings menu that appears below the form field, you will see that the top option is **REQUIRED FIELD (1)**. This will always be disabled by default. Click the **SLIDER BUTTON (2)** to make the field required.



The **SLIDER BUTTON (1)** status will change to enabled, and you will see a **RED LINE (2)** along the side of the field. This indicates that the field is required. You can close the field settings by clicking the **UP-FACING ARROW (3)**.

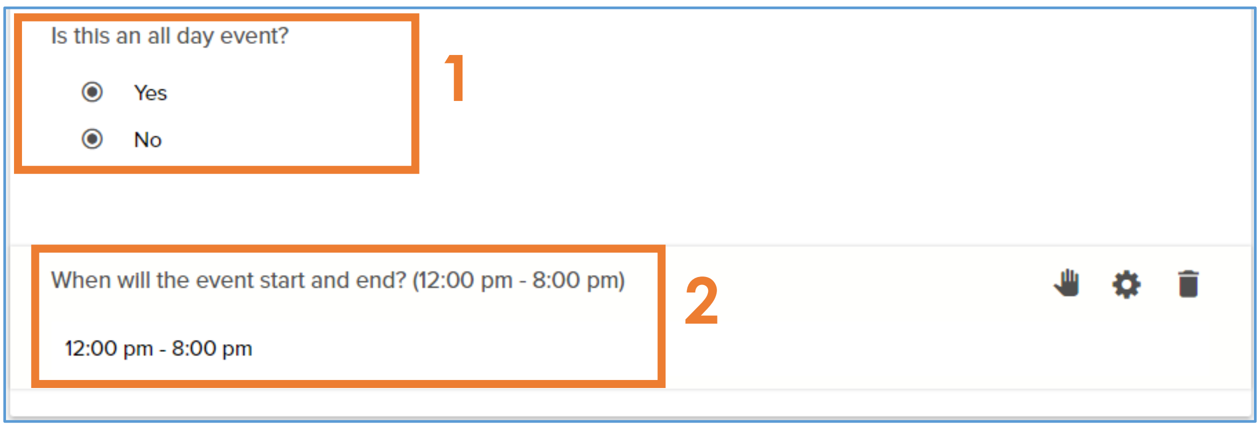
USING SMART LOGIC

Smart logic is a difficult concept. Sometimes we only need to ask a customer a specific question if they gave a specific answer to a previous question.

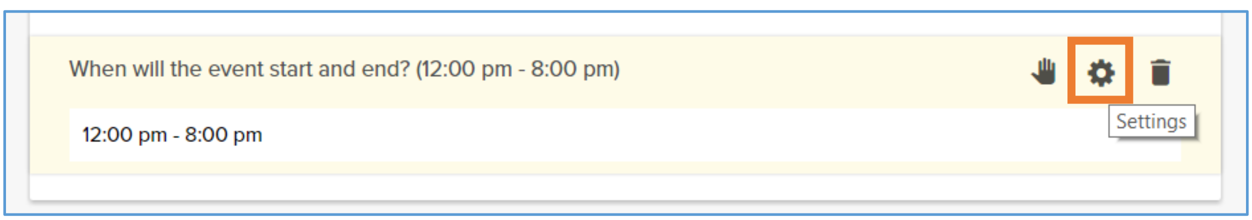
Here's an example based on a Special Events form:

- We need to know if an event will last all day.
- If an event lasts all day, then we have all the information we need, but
- If an event does not last all day, then we need to know what time the event will start and when it will end.

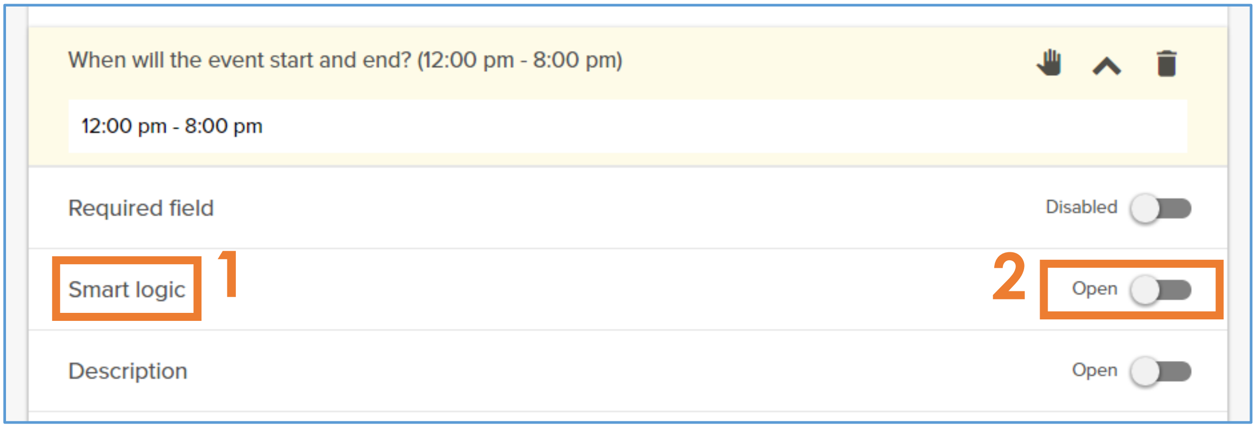
So, below the **RADIO BUTTON FIELD (1)** asking if the event is all day, we add a **TEXT FIELD (2)** asking when the event will start and end. We only need to ask for the start and end times, though, if the customer answers no to the first question.



To do this, first we click the **SETTINGS ICON** on the start and end time question.

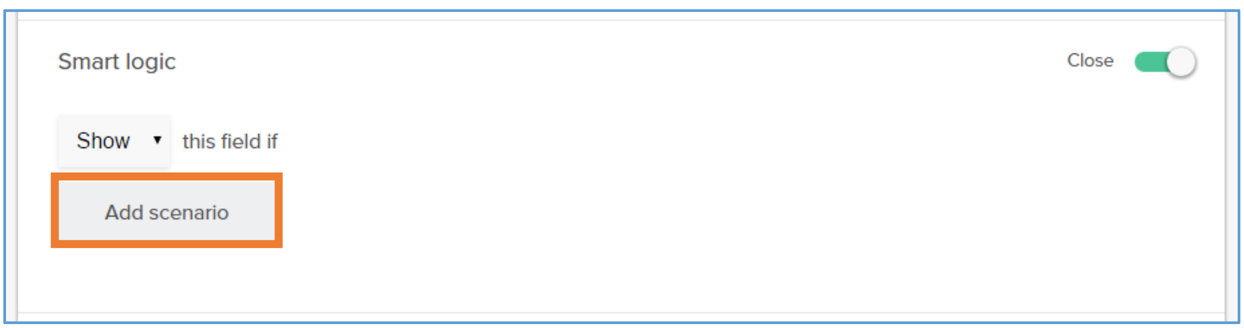


Then we find **DISPLAY LOGIC (1)** and click the **SLIDER BUTTON (2)** to open this setting.

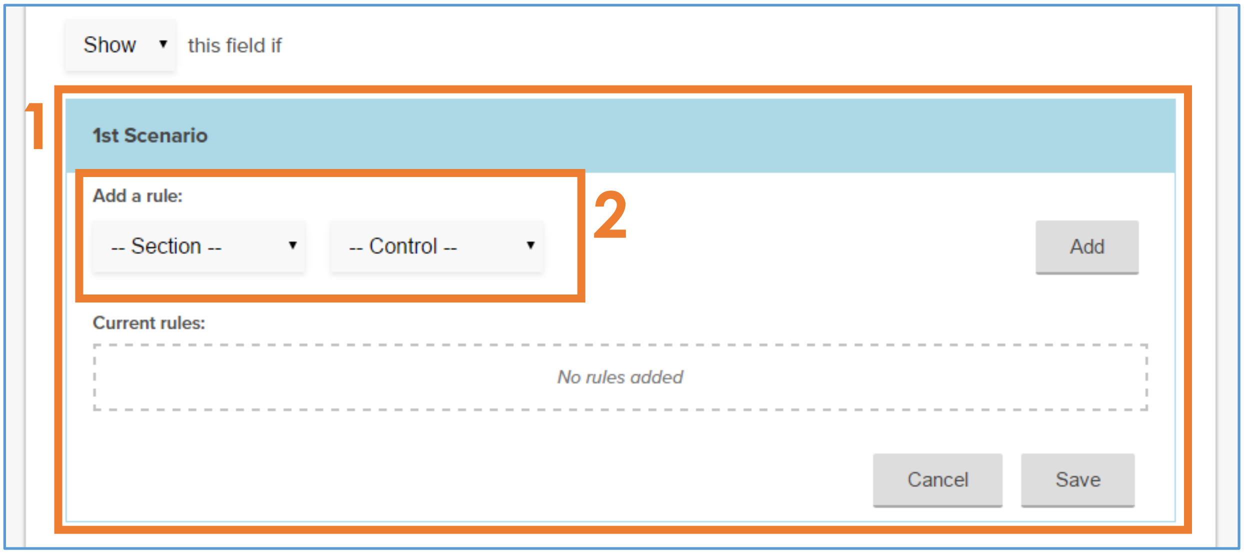


Now we see the **SMART LOGIC SETTINGS (1)**. You will see a dropdown menu with **SHOW (2)** automatically selected. You will always use the show setting, so don't worry about changing this.

Now we need to click **ADD SCENARIO**.

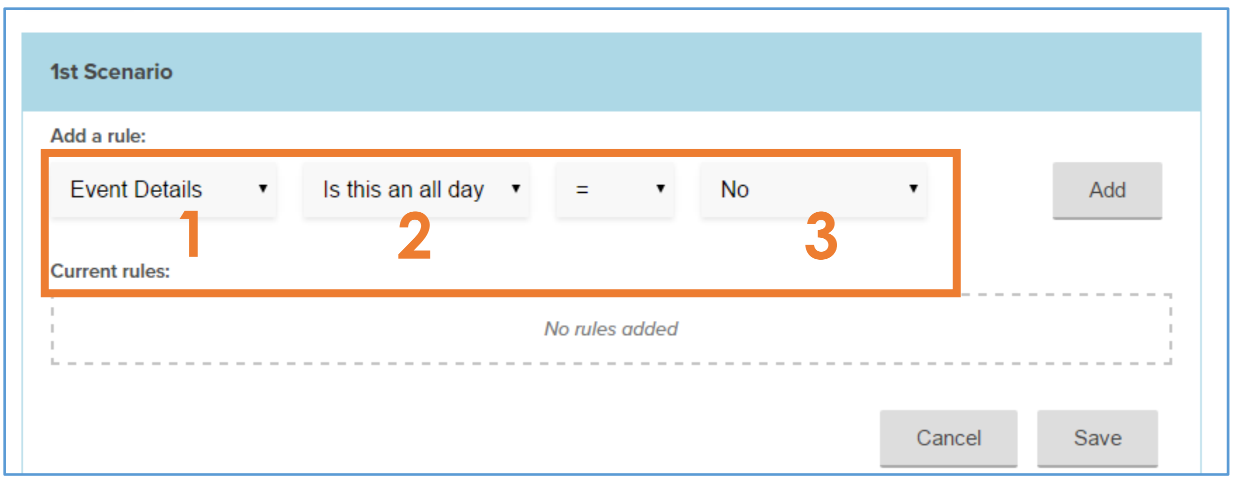


A box labeled **1ST SCENARIO (1)** will appear. We need to **ADD A RULE (2)** to make our smart logic work.



Think of this as a logic statement: we only want to show this question if the customer answers no to the all-day event question.

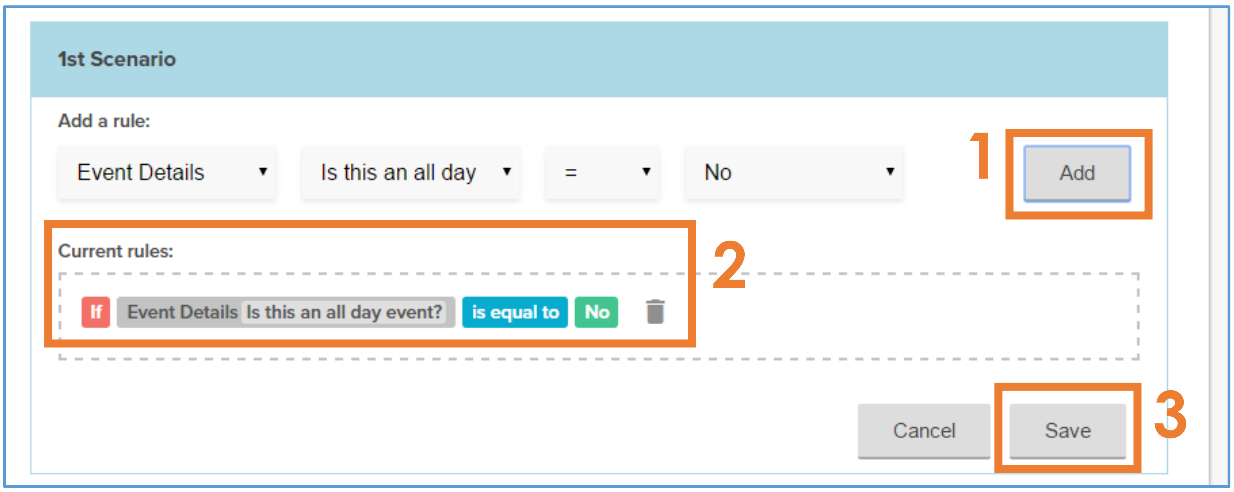
So, we select the **SECTION (1)** that the all-day event question is in, then we select the **CONTROL (2)** – which is the all-day event question. Finally, we set the **ANSWER (3)** to the question that will trigger this question to show – in this case, "no".



Think of it this way: our statement now reads, "*ONLY SHOW* this question *IF* the answer to the all-day event question *IS NO*."

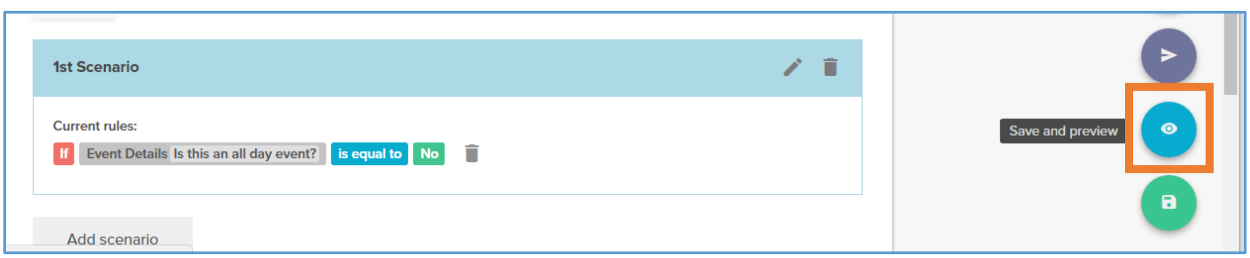
If you realize that you made a mistake in your rule, delete it from the current rules box by clicking the **DELETE ICON** and start over.

When your rule looks right, click **ADD (1)** and make sure that your rule appears in the **CURRENT RULES (2)**, then click **SAVE (3)**. (You *must* click add before clicking save, or your logic will not work.)



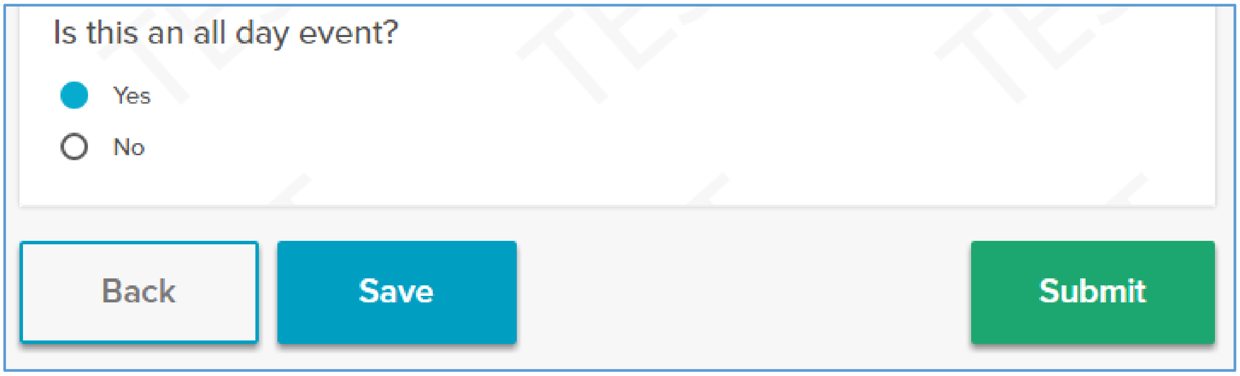
TESTING SMART LOGIC

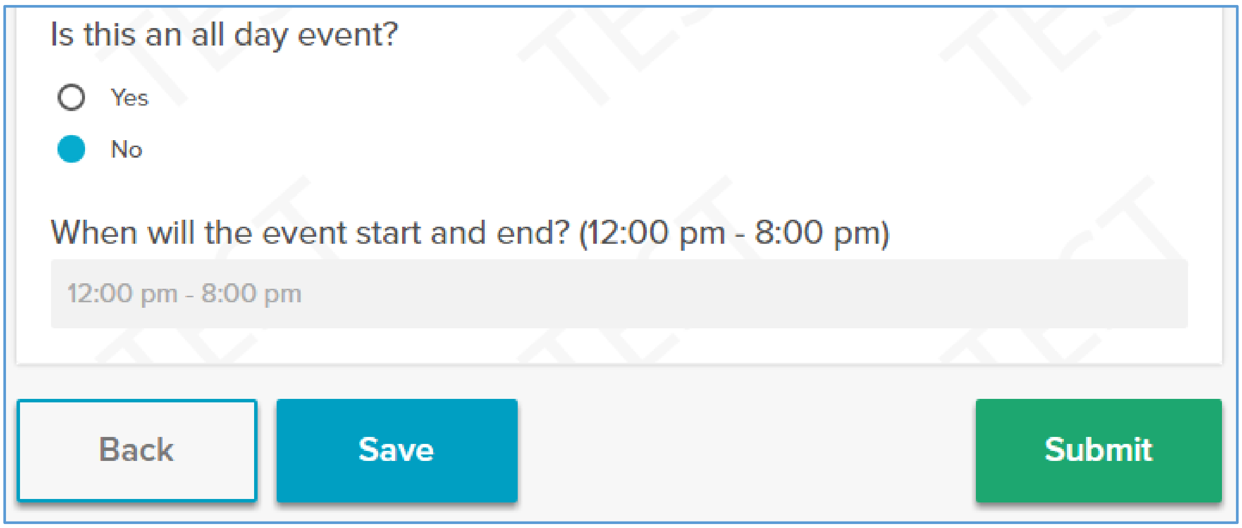
You should always test your logic to make sure that it is working. First, cllick **PREVIEW** in the bottom-right corner.



Next, find the question your rule is tied to and try answering *both ways* to make sure it is working.

In our example, the screenshots below show that our rule is working. When the answer to the all-day event question is yes, the question *doesn't* show. When the answer is no, the question *does* show.





Questions?

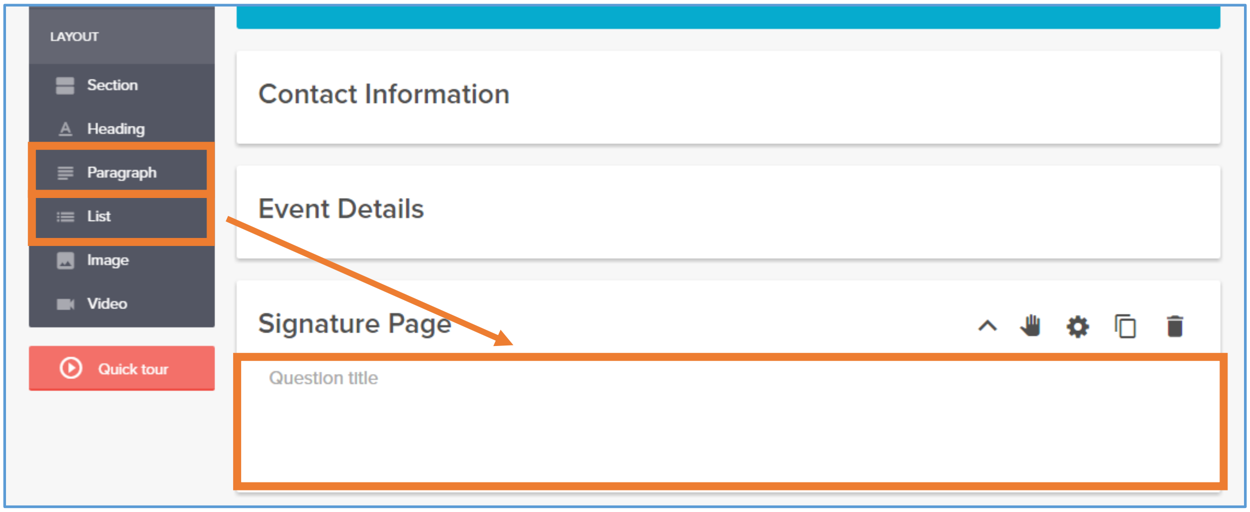
Smart logic can be confusing, and we are here to help. Contact the GR Digital Team.

USING SIGNATURE FIELDS

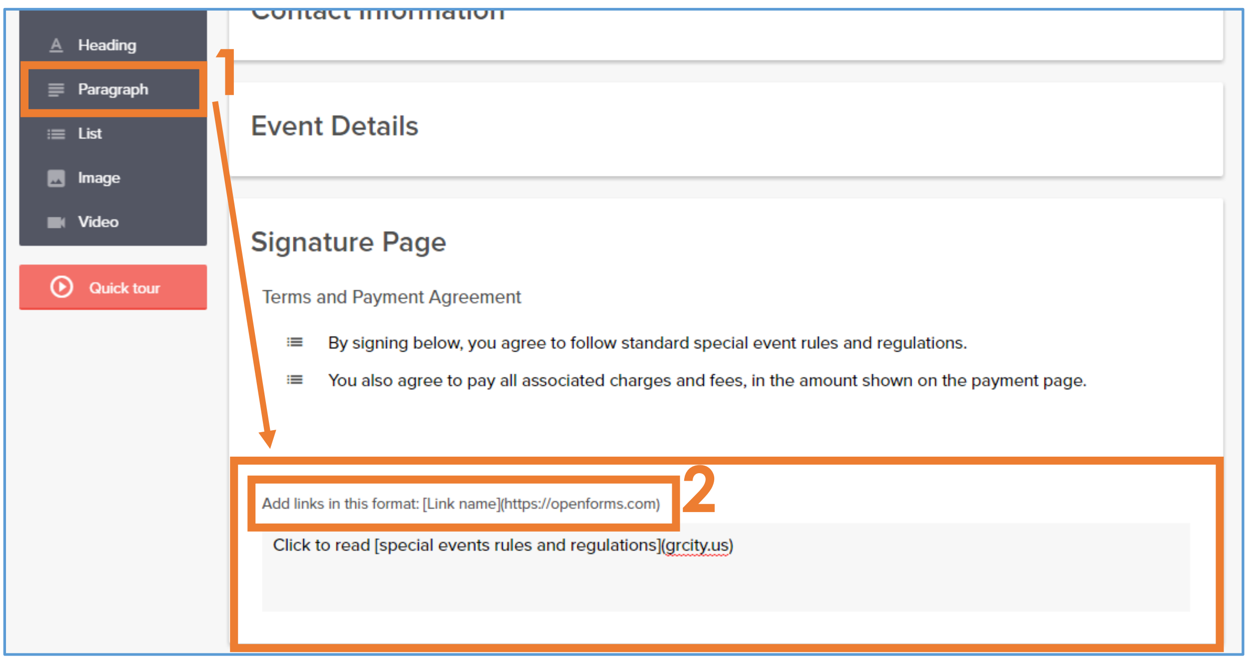
OpenForms allows customers to sign forms indicating agreement to the terms of your service/transaction. The customer signs using either their mouse/cursor on a computer or their finger on a touchscreen device.

These signatures are widely accepted as valid under Michigan law. If you are questioning whether your service type can accept these electronic signatures, contact the GR Digital Team for guidance.

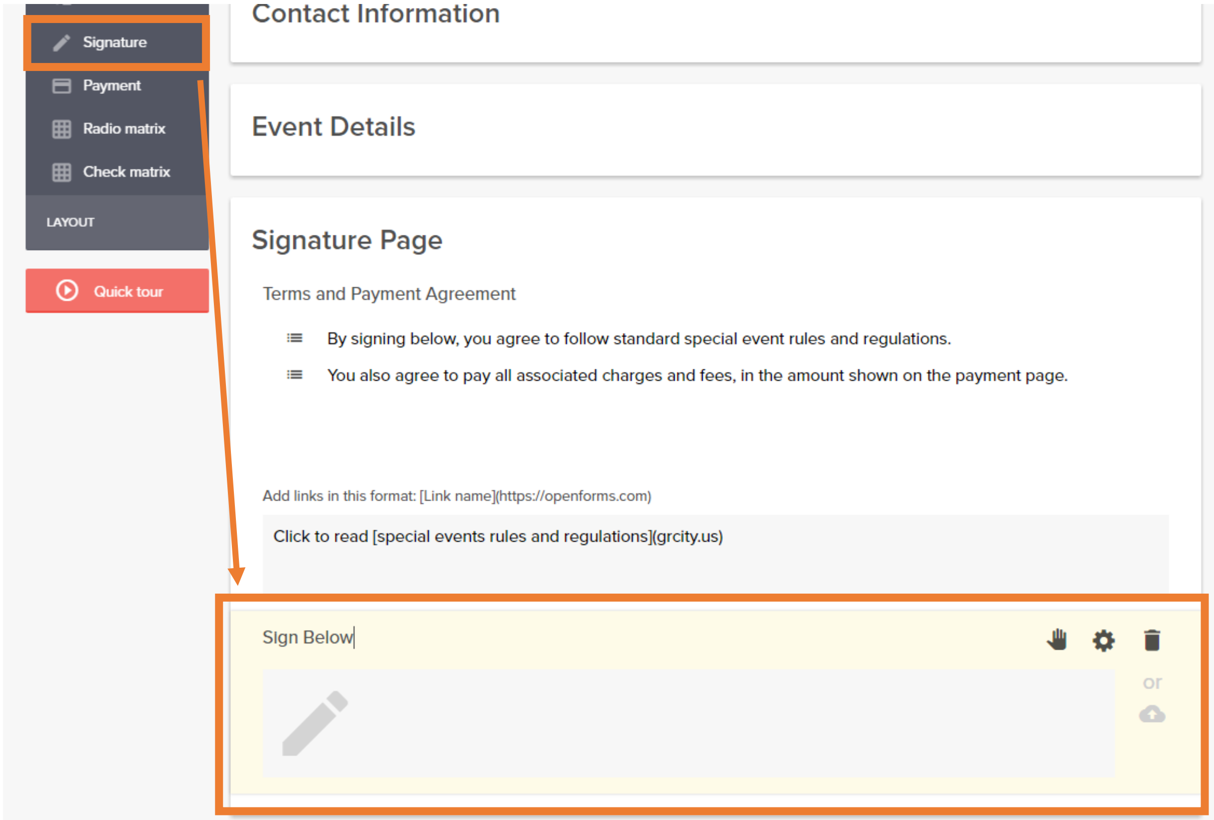
Create a signature page section and add a **PARAGRAPH** or **LIST** field to enter the terms and charges the customer is agreeing to follow and pay.



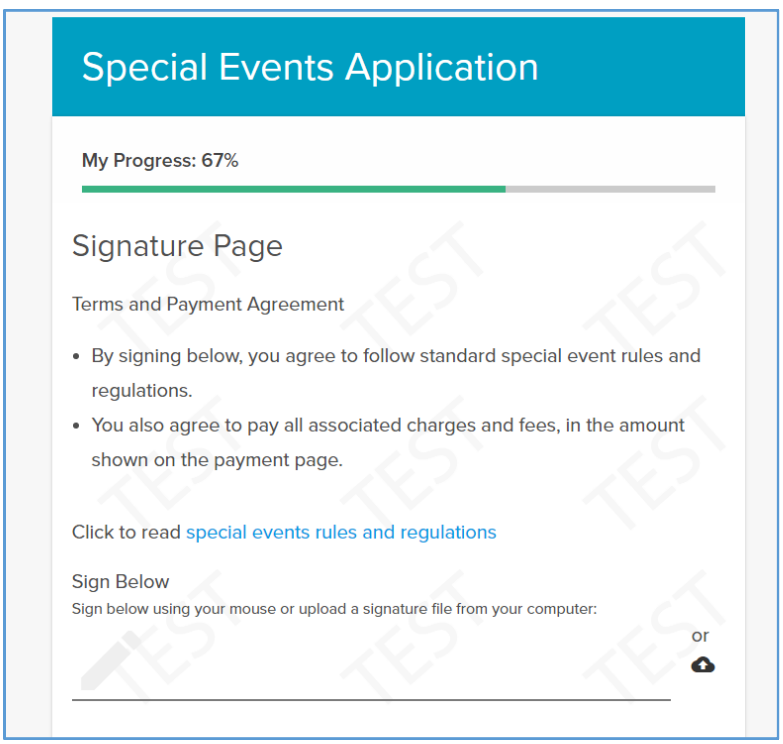
Enter the terms of the agreement and payment. The list field is useful here because you can separate each part of the agreement into more readable pieces. It's a good idea to include a **PARAGRAPH FIELD (1)** with a link to your service/transaction's standard terms so that the customer can review these before signing. The paragraph field includes **INSTRUCTIONS (2)** for adding hyperlinks.



Now it is time to add the **SIGNATURE FIELD** to collect the customer's signature. Change the question title to *Sign Below*.



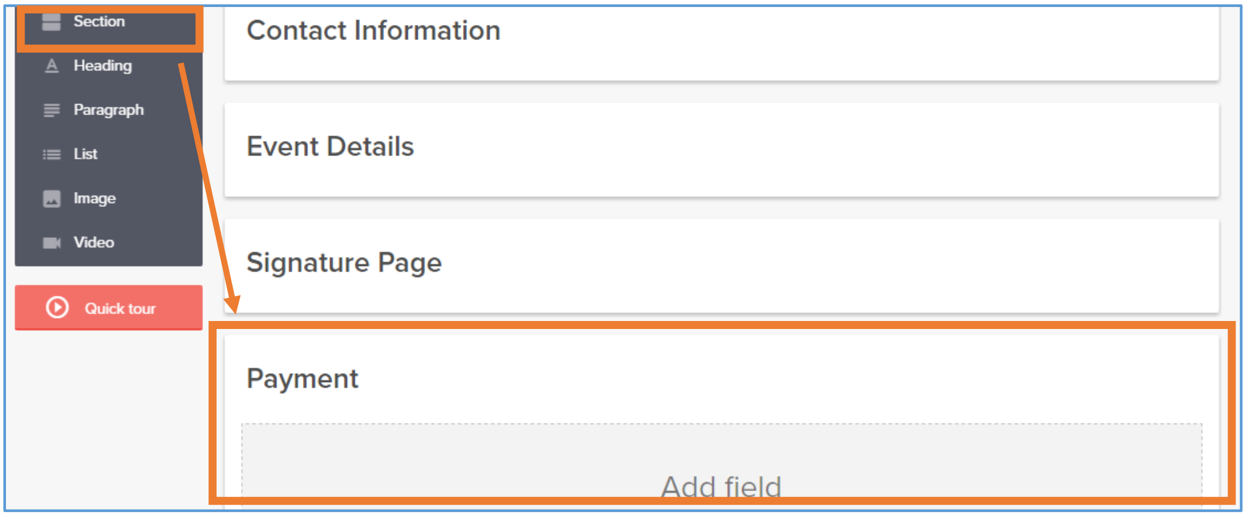
This is what customers see when they get to this section.



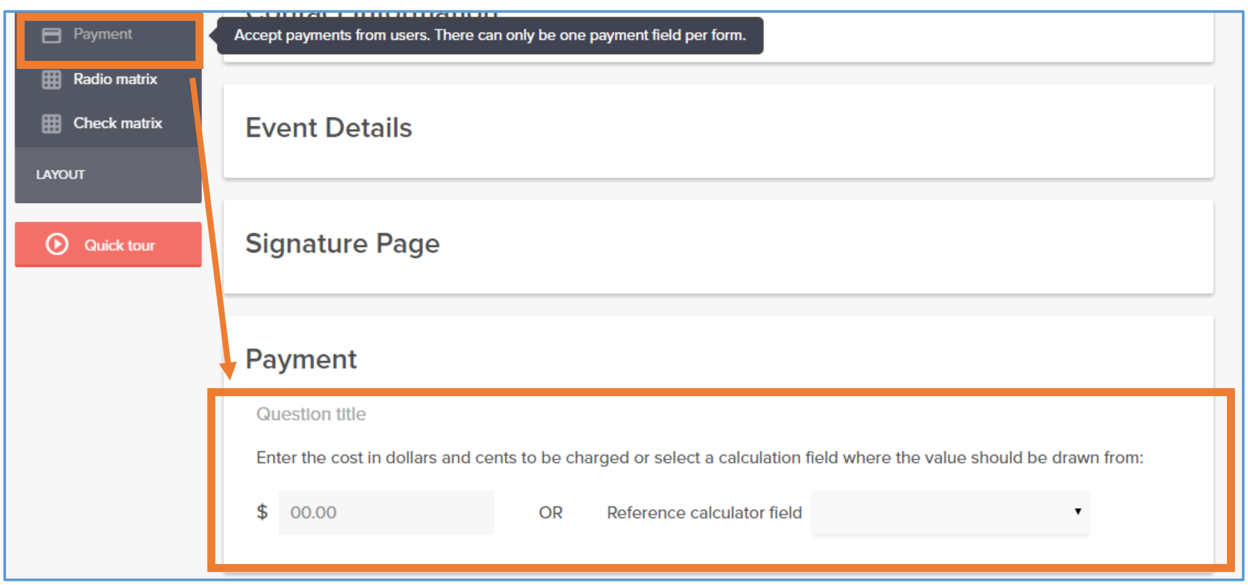
USING CALCULATED AND PAYMENT FIELDS

Some services require payments. OpenForms has the ability to calculate total costs based on either number fields that the customer has completed or flat costs for a service. Calculated fields can also add taxes and/or fees. If your service requires payment, this should be the last section of your form.

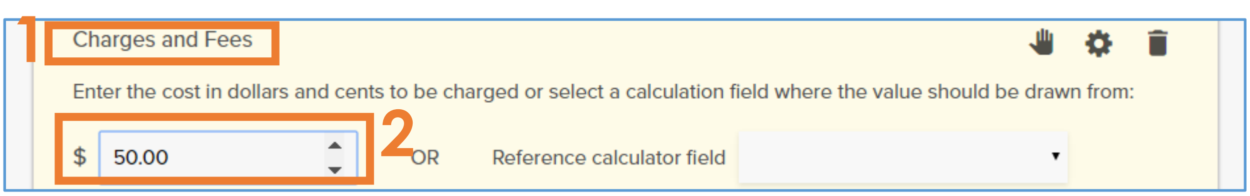
Add a new **SECTION** and title it *Payment*.



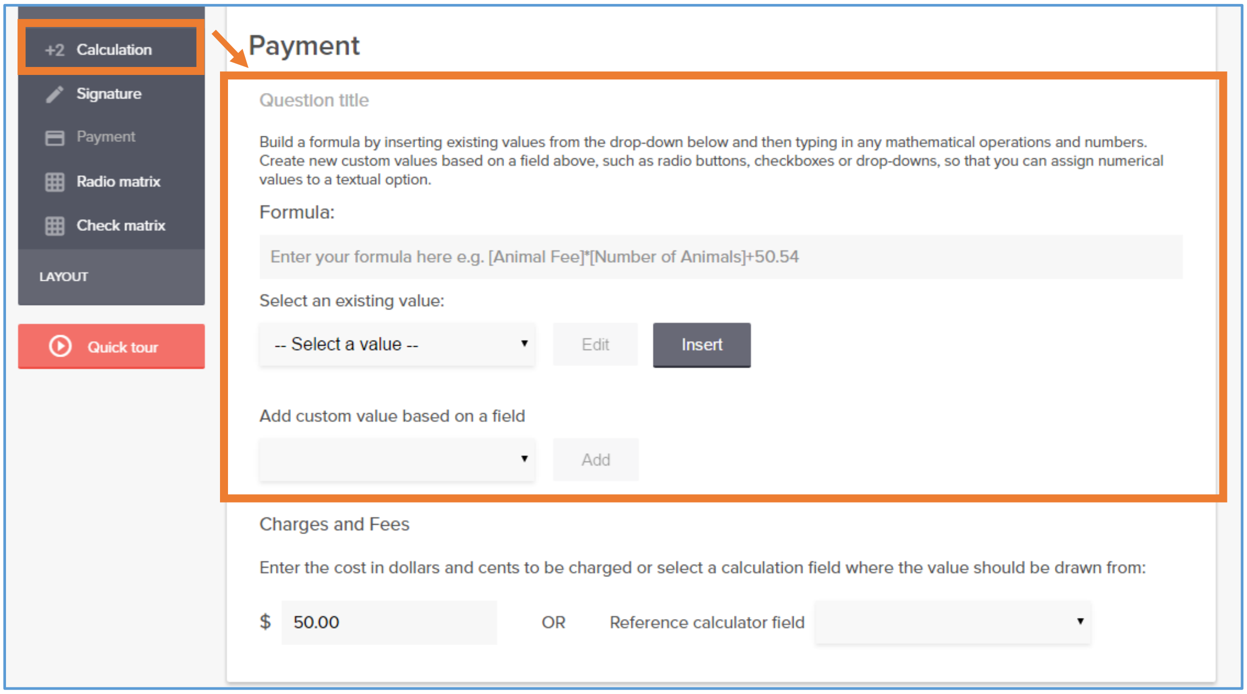
Some services have a fixed rate with no variation based on customer choices. For example, some services only need a **PAYMENT FIELD** to charge the customer the fixed price of a service/transaction.



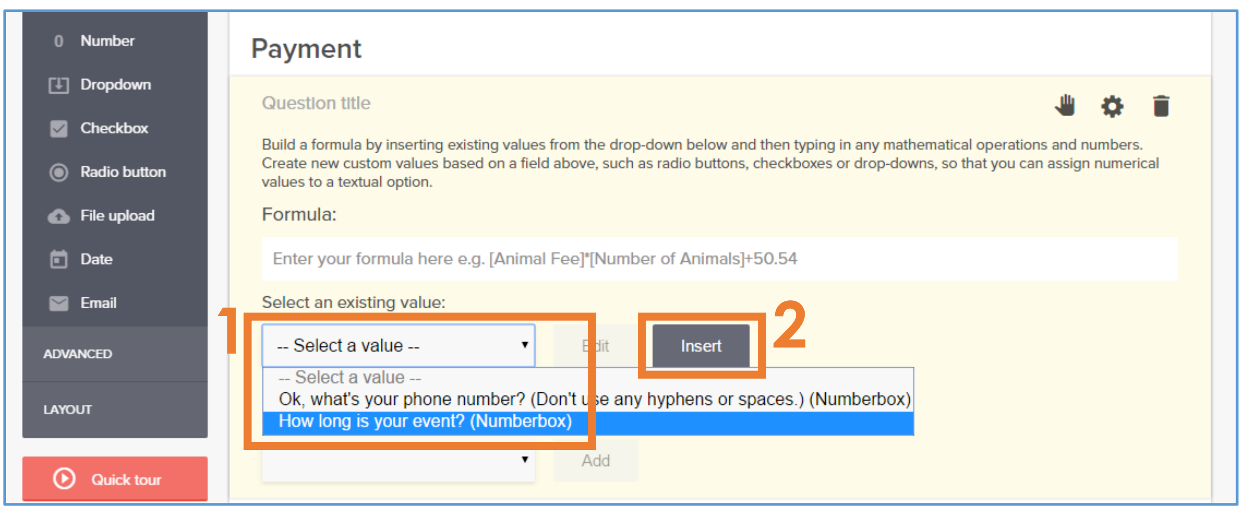
Change the **QUESTION TITLE (1)** and **COST (2)** in the payment field.



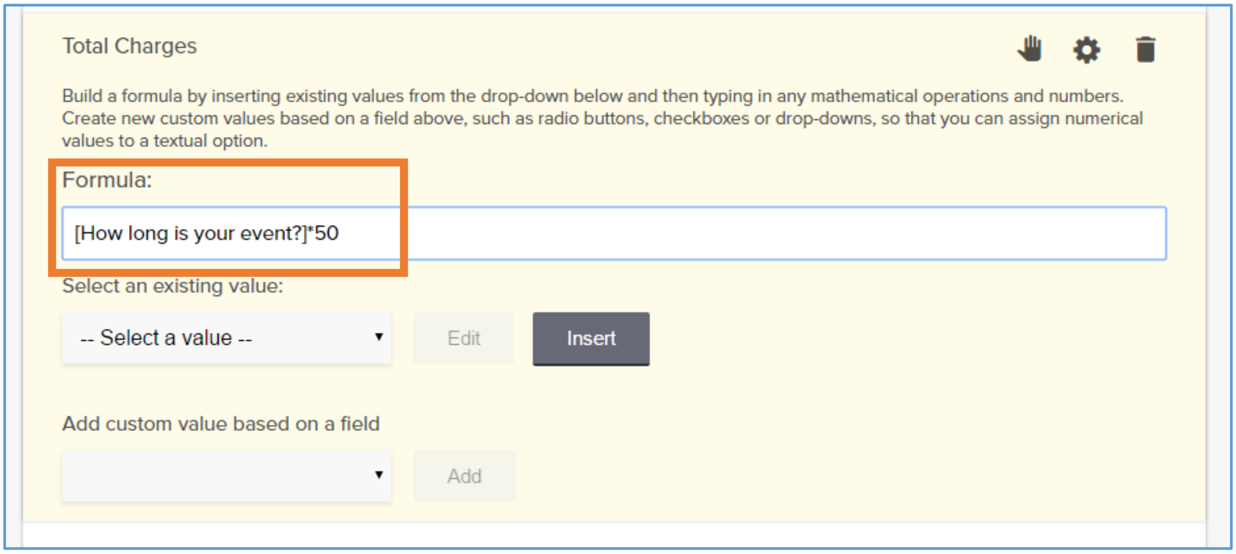
Other services will have several possible charges based on options that the customer chooses. In this case, you will need to add a **CALCULATION FIELD** in addition to a payment field.



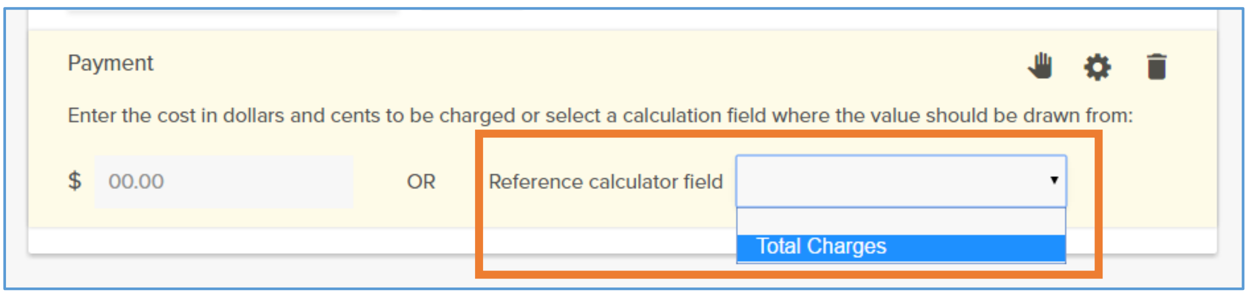
Take this example: we are using a made up formula for calculating the cost of a special event. We will use the length of the event (number of hours) multiplied by a standard rate per hour. Insert the *How long is your event?* Field using the **SELECT A VALUE INPUT (1)**. Click **INSERT (2)** to add this to the Formula.



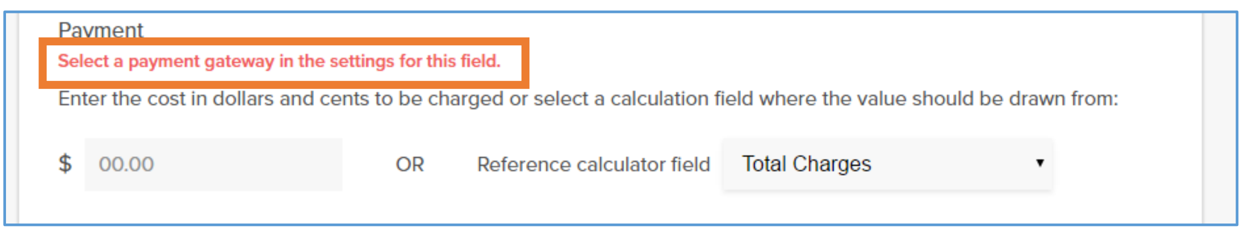
Now, in this example, we multiply the number of hours that the customer enters by the cost per hour in the **FORMULA** field. For this example, we will use a rate of $50 per hour.



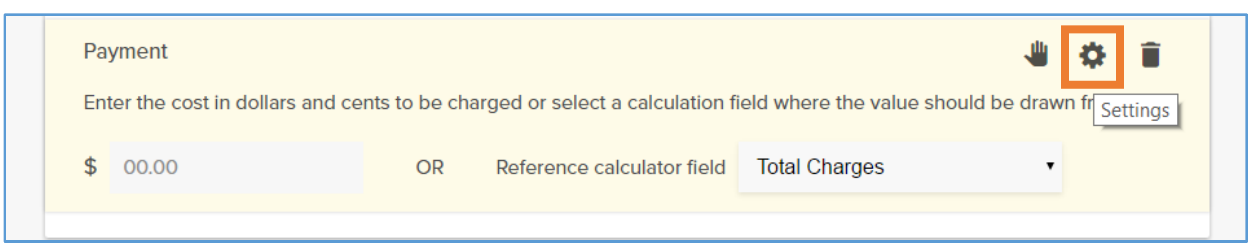
Next, select the **REFERENCE CALCULATOR FIELD** from the dropdown menu in the payment field below the calculated field. Now the customer is charged what is calculated from their selections in the form.



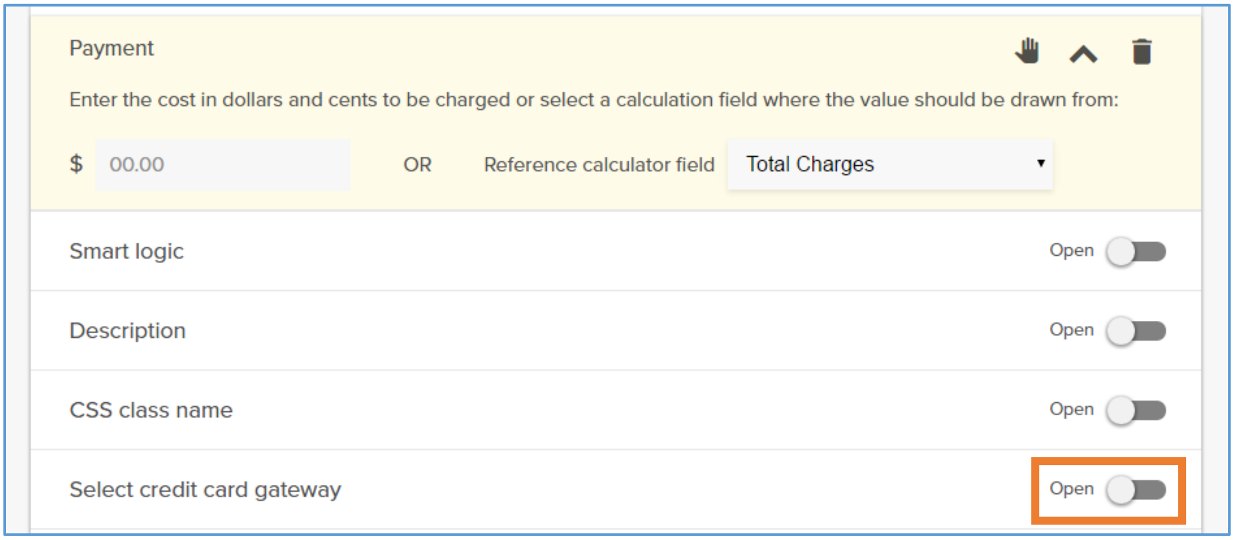
In this final step for accepting payment, we connect the City's payment gateway to the form. Without this step your form can't actually accept payment. Your form **WILL NOT ALLOW YOU TO SAVE** without connecting the gateway.



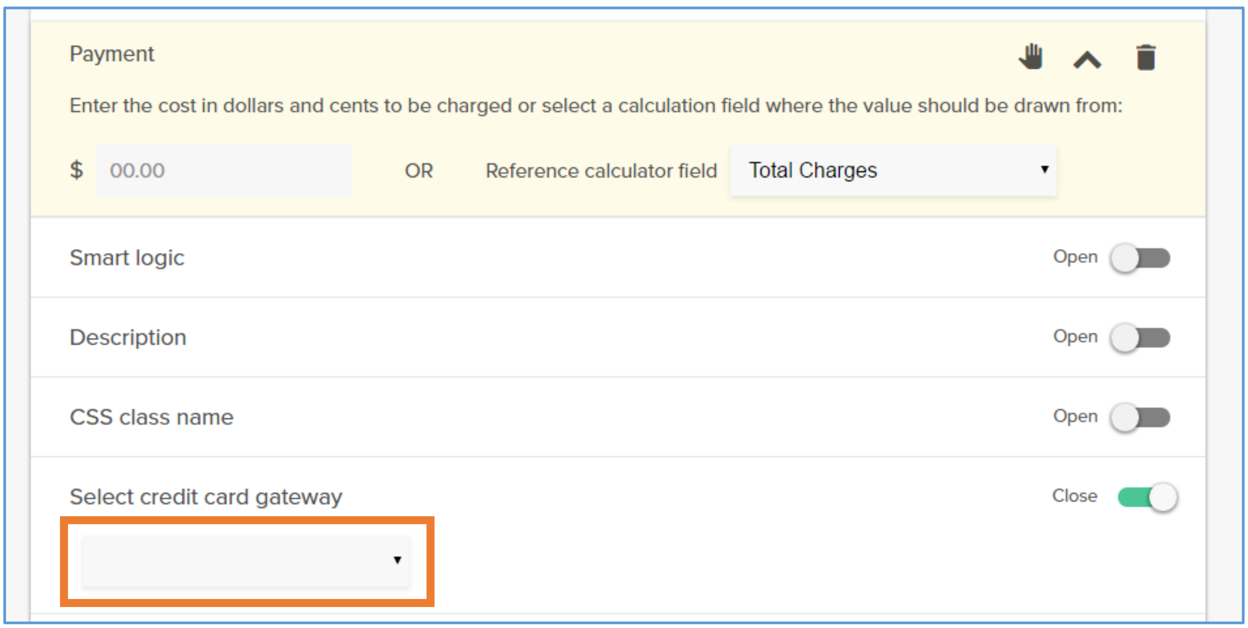
First, click on the **SETTINGS ICON** for the payment field.



Click the **OPEN SLIDER BUTTON** on the Select credit card gateway settings item.



Select the City's payment gateway from the **DROPDOWN MENU**. After you save your form, it's now complete and ready to accept payment for your service/transaction!

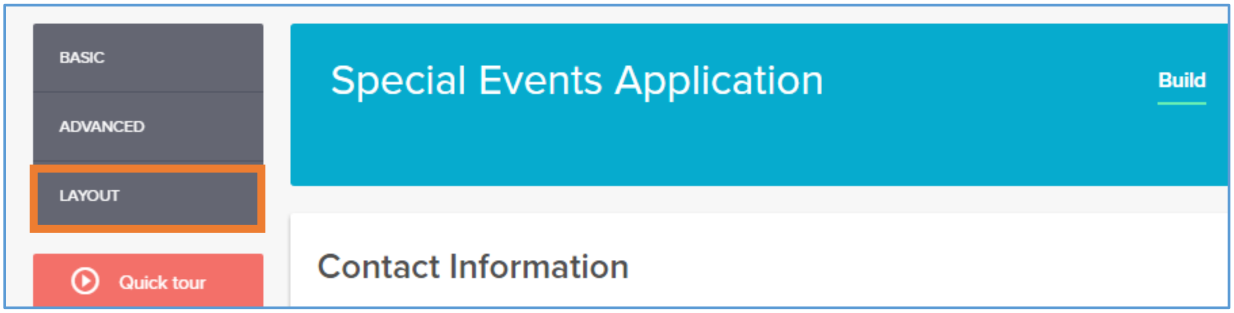


ADDING FORMATTING FIELDS

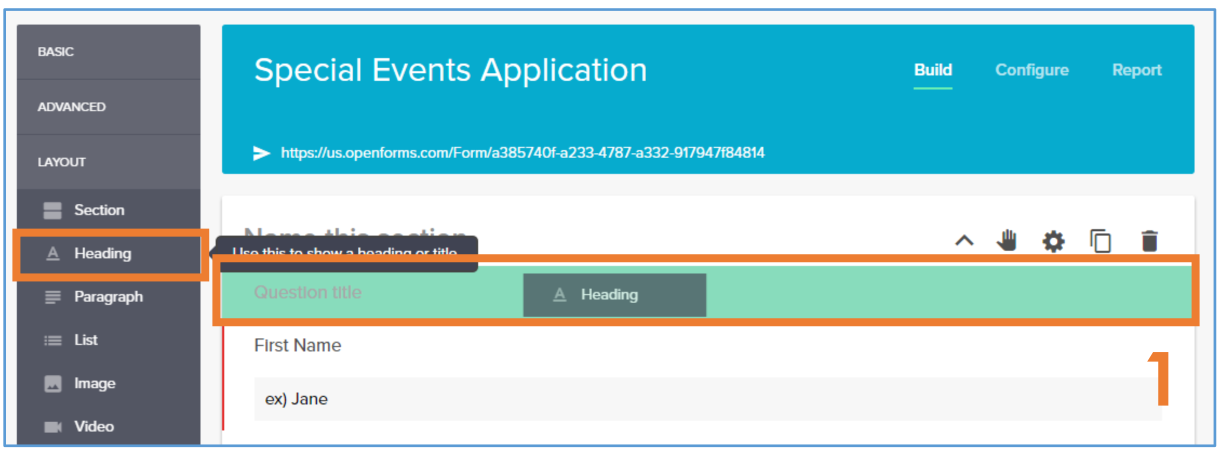
Formatting Fields are areas of the form that a customer does not directly respond to.

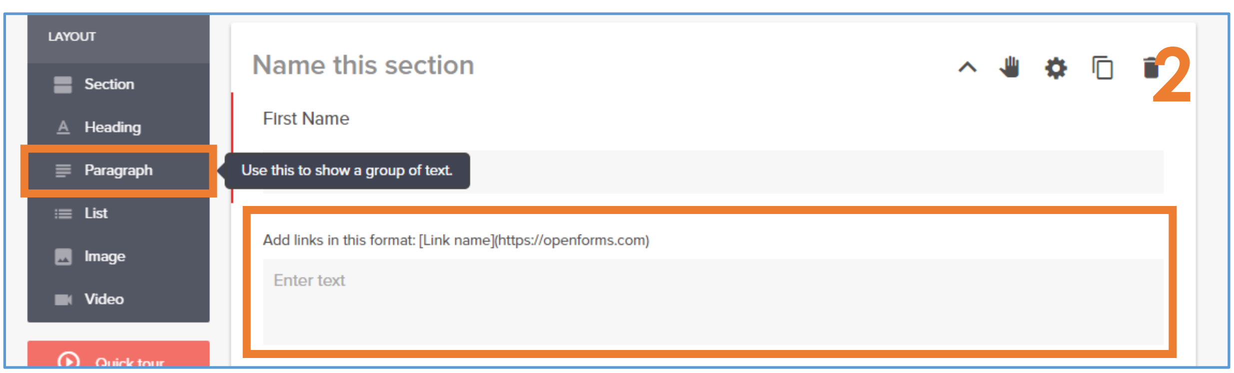
The best example of a formatting Field is written instructions that provide information to the customer but do not need a response.

Sections are formatting elements, too, but we've already covered those. You can find formatting elements under the **LAYOUT** section of the left-side toolbar.



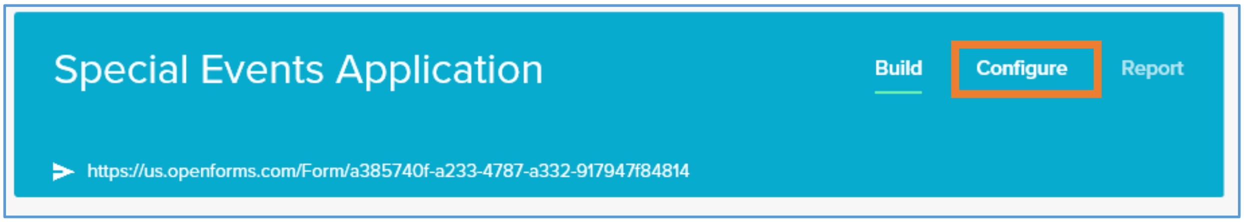
You add formatting elements the same way you add form fields: either **1. DRAG AND DROP** into the position you want them or **2. CLICK THE ICON** in the left-hand toolbar to add your selection to the bottom of the form.



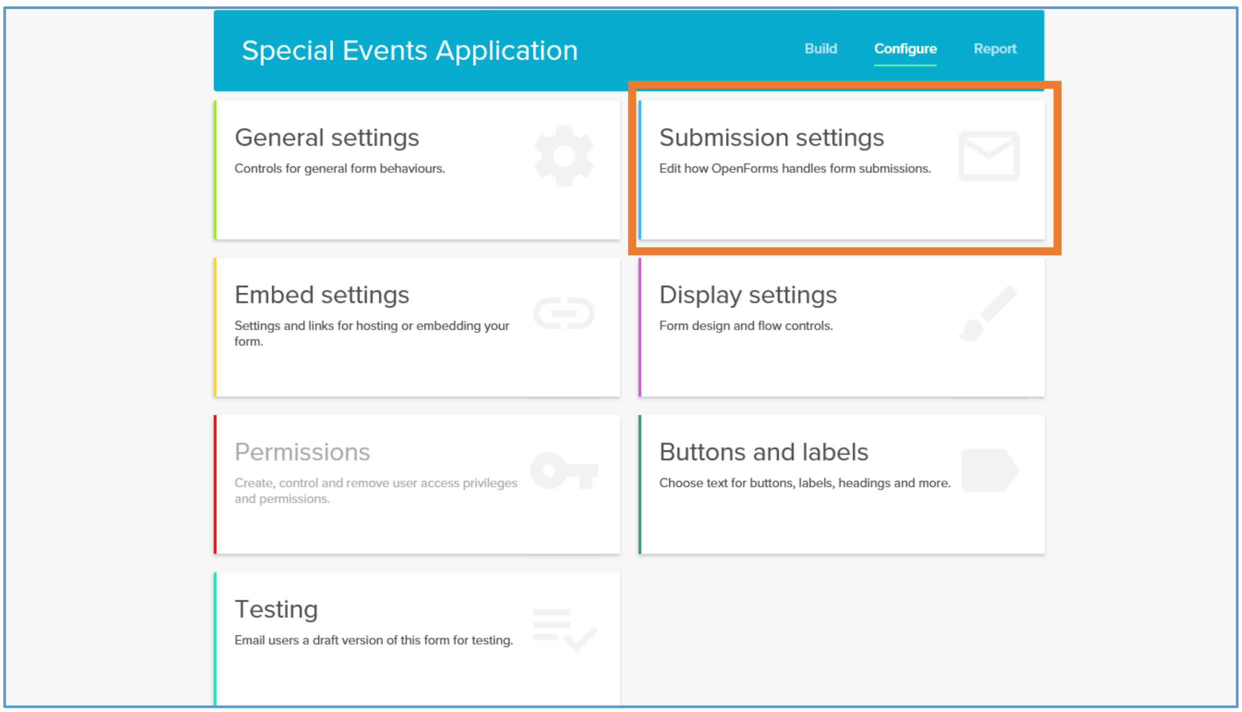


ADDING A SUBMISSION CONFIRMATION MESSAGE

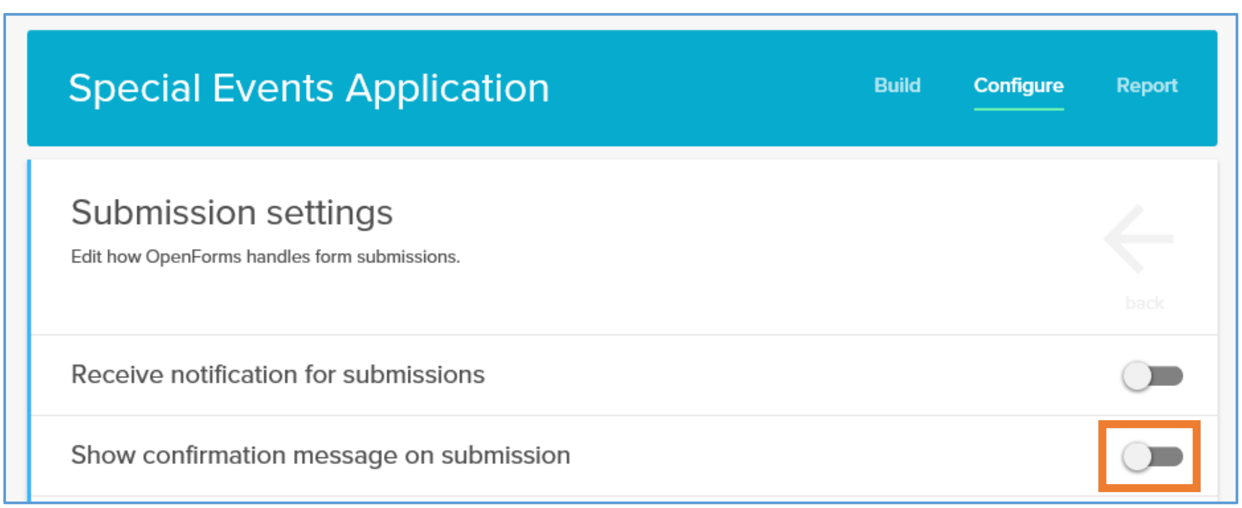
To add a confirmation message, click **CONFIGURE** at the top right of your form title header to access the settings.



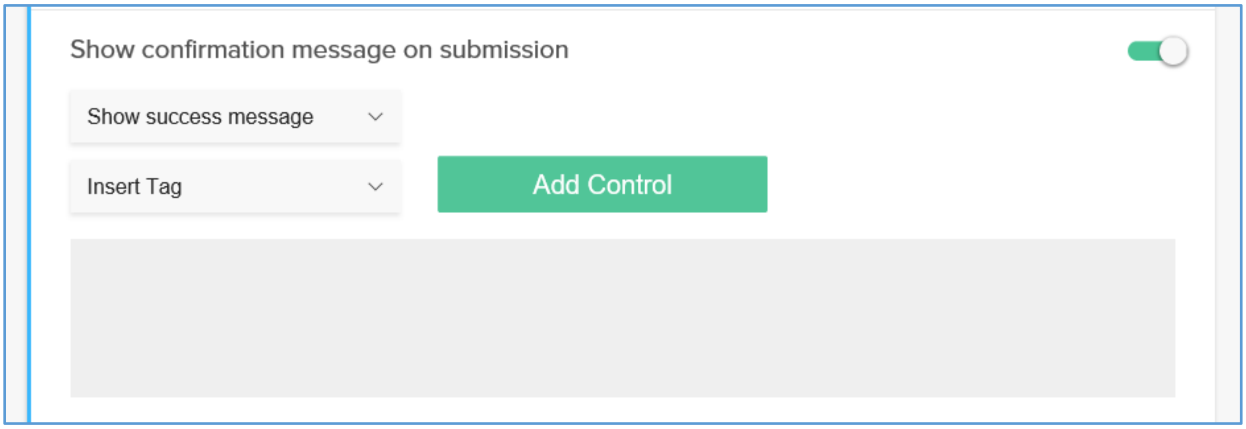
Click **SUBMISSION SETTINGS** from the form settings categories.



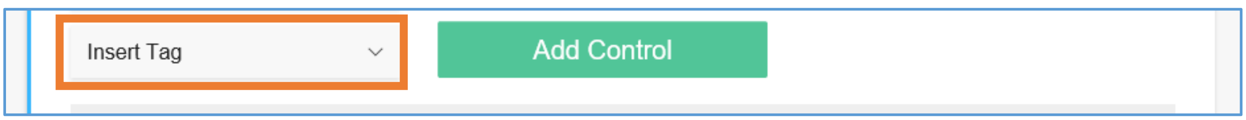
Click the **SLIDER BUTTON** next to the Show confirmation message on submission menu item.



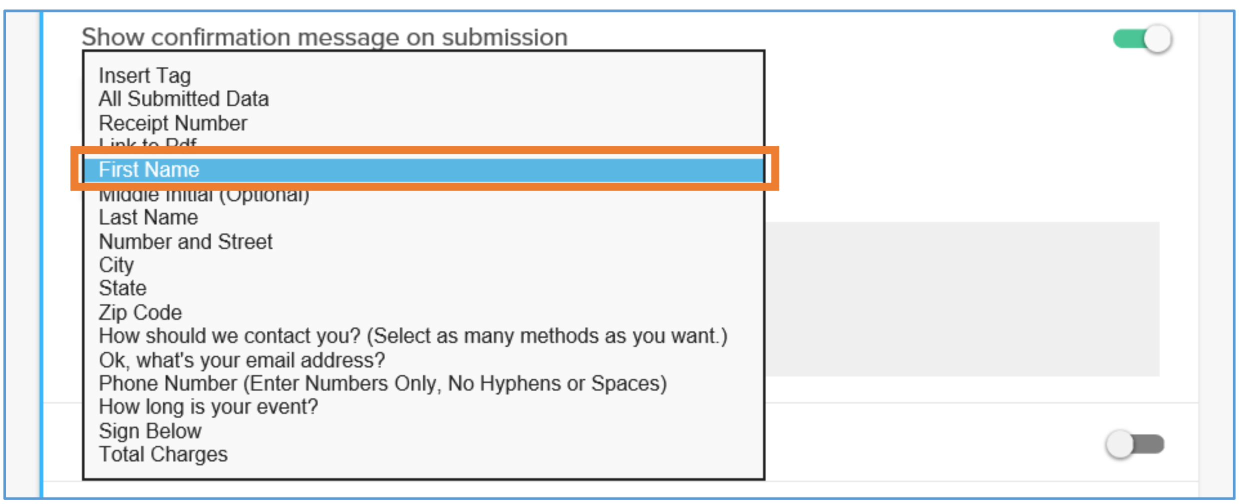
Using this setting, you can setup a message to display to customers every time they submit a completed form. You can even personalize the message to include their name if you collect it in the form. (See below.)



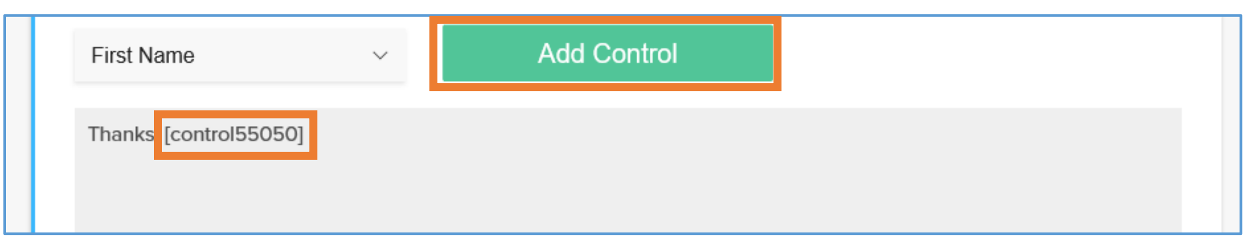
To include a field that the customer entered in the message, like first name, use the **INSERT TAG** dropdown menu.



Choose the appropriate **FIELD** from the dropdown Menu.



Click **ADD CONTROL**, and the **FIELD CONTROL** will appear in your message text.



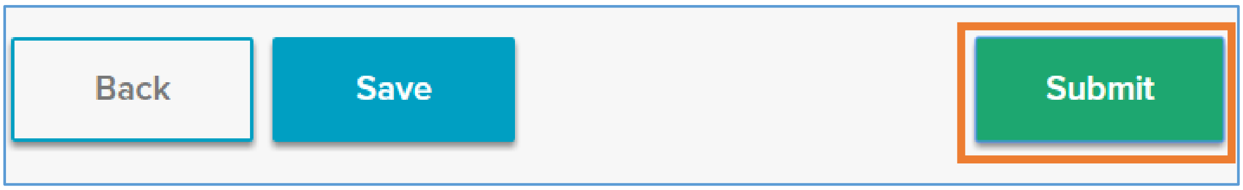
Finish typing your message. Now when customers submit their forms, they will see your message!

Submission Complete

Thanks, Zac! We got your submission. We'll contact you with more information and status updates.

EDITING BUTTON LABELS

OpenForms allows form creators to change the labels on the buttons that allow users to go **BACK** to a previous section, **SAVE** their progress and email the saved form to themselves to complete later, **CONTINUE** to the next session, or **SUBMIT** their completed form.



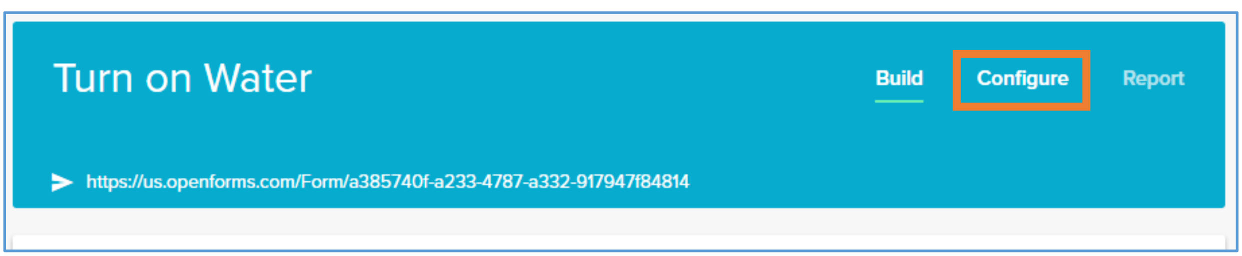
Changing button labels is useful for forms that need to be routed to multiple people to complete separate sections before they can be submitted to the City. Here is a goof example: to start water at a rental property that a tenant is responsible for, the City needs information from both the tenant *and* the landlord.

In basic forms, the save button is best used for customers to send a link to themselves so that they can return to their partially completed form to finish it at a later time.

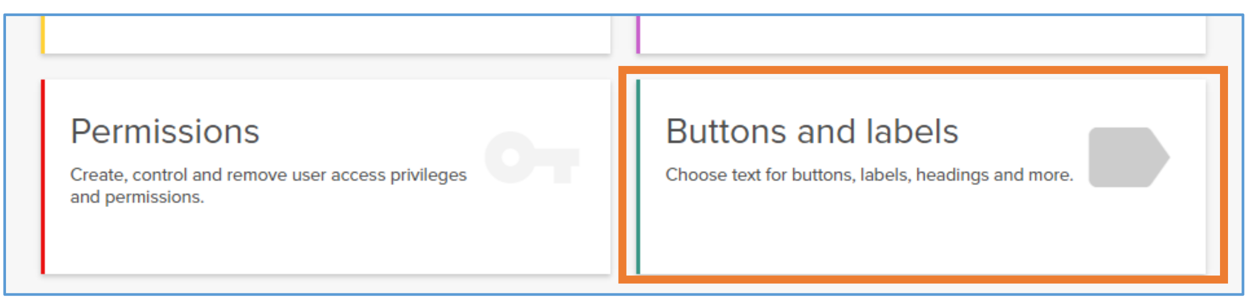
In these more complex forms that truly have multiple parties responsible for separate sections, the save button is better used to route the form to those other parties.

To make this clear, it is best to change the save button label.

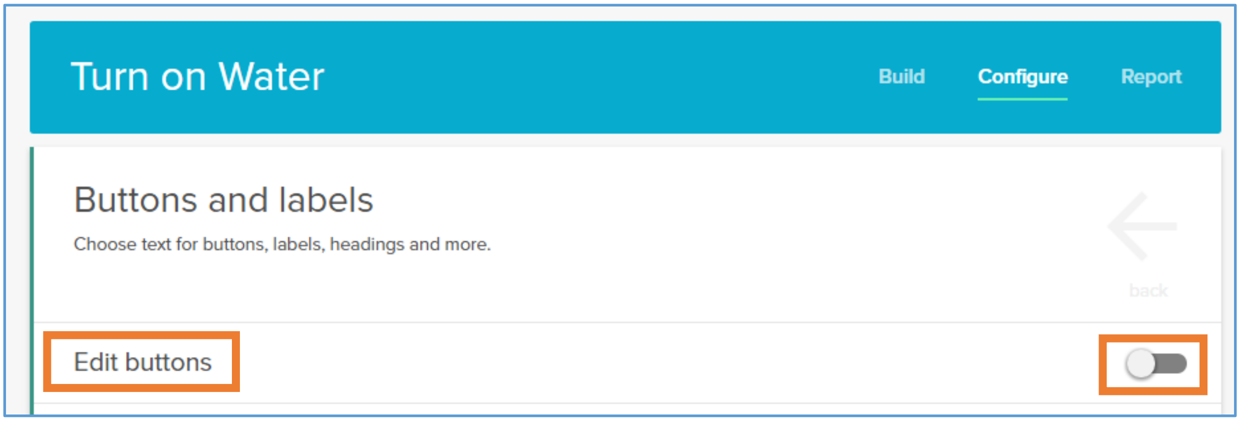
To change button labels, click **CONFIGURE** at the top-right of your form title heading.



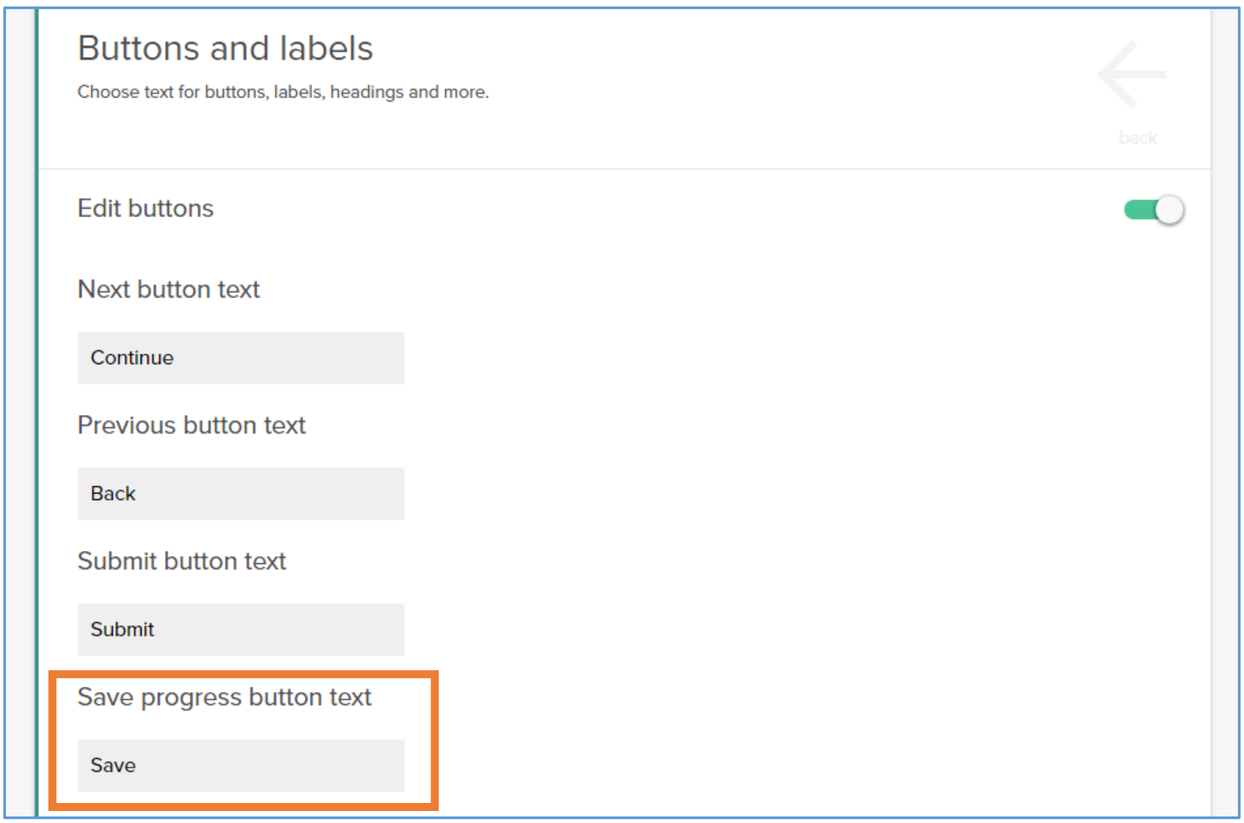
Next, click the **BUTTONS AND LABELS** section in the configure menu.



To change the button labels, click the **SLIDER** to the right of the **EDIT BUTTONS** menu item.

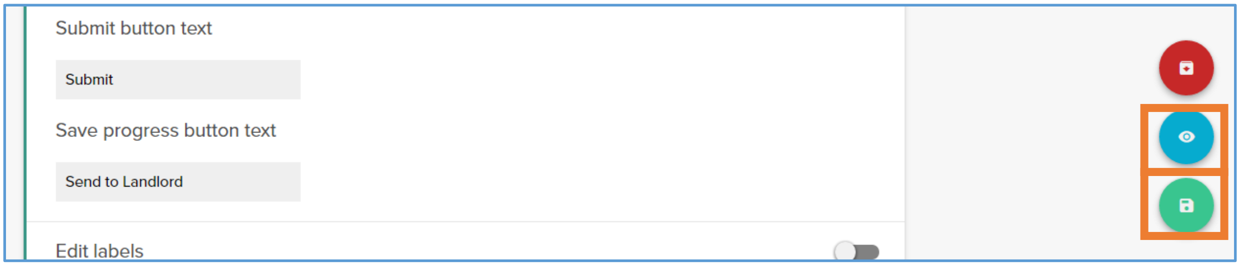


Find the **SAVE PROGRESS BUTTON TEXT** section.



Change the **TEXT** to make it clear to the customer that the form will be sent to someone else to be completed. In this case, we change the text to *Send to Landlord*.

Click **SAVE**, then click **PREVIEW**.



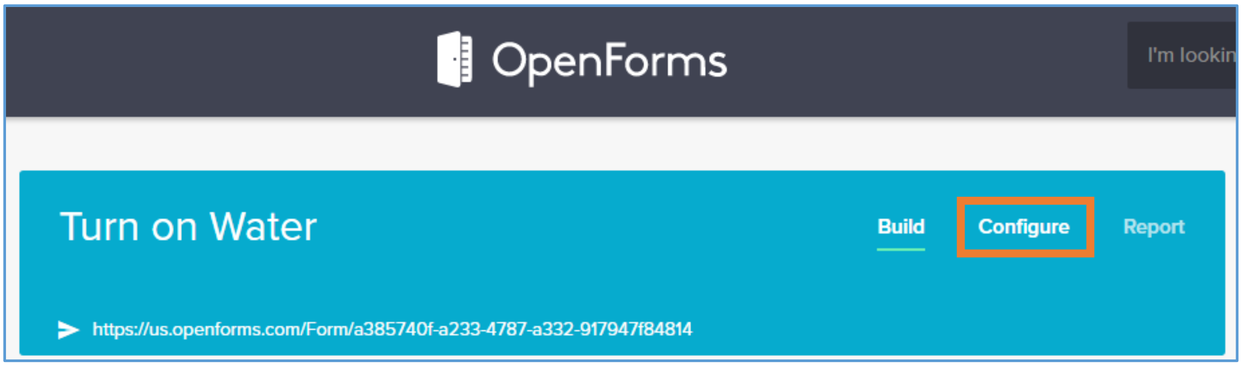
The **BUTTON** in the preview should now read *Send to Landlord*.

If you click the button, though, you will notice that the dialog box that opens and asks for an email input still reads as though this were a save button. This leads into the next section of this manual, **EDIT 'SAVE PROGRESS' POPUP**.

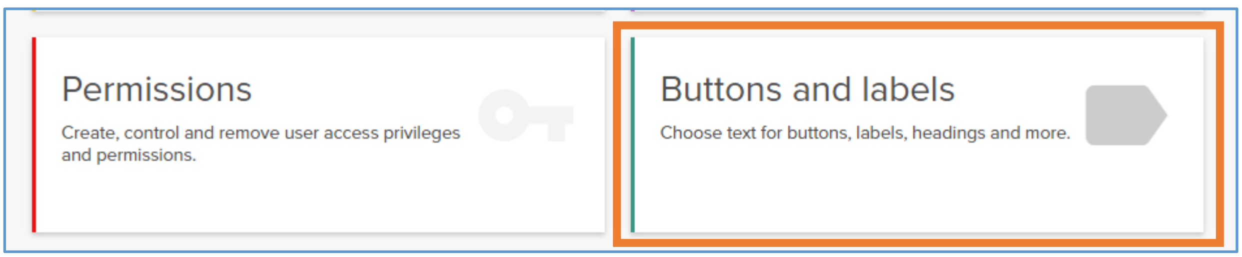
EDITING THE 'SAVE PROGRESS' POPUP

In the previous section, we talked about the advantages of changing the save button text in certain form scenarios. When we do this, though, we also need to change the popup that asks for email input from the user to reflect the purpose of the button change.

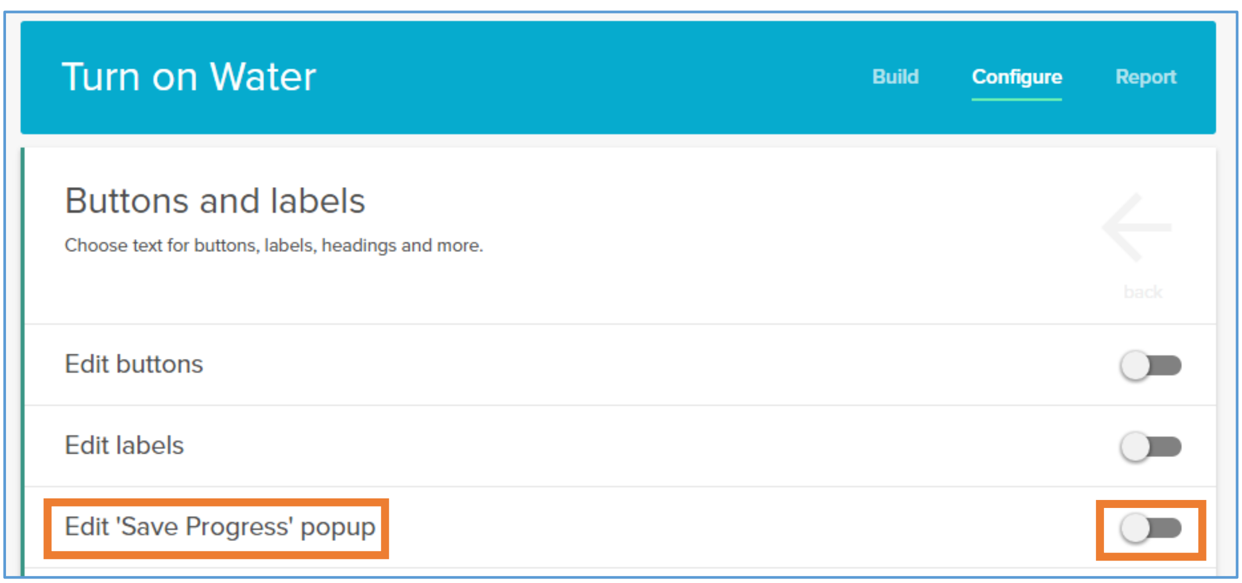
Edit your form and click **CONFIGURE** at the top right of your form title header.



Access the **BUTTONS AND LABELS** settings.

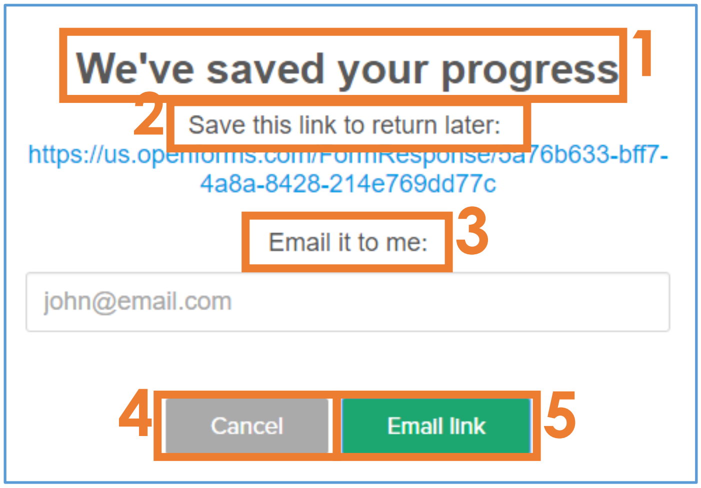


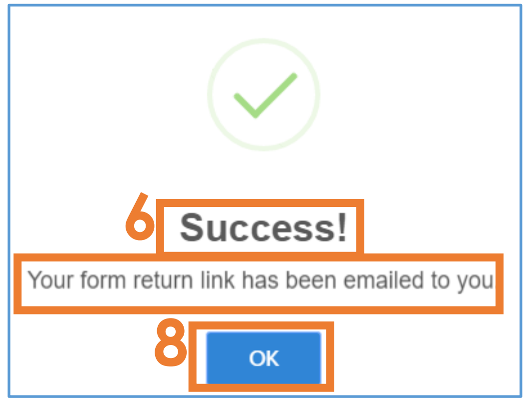
Find the **EDIT 'SAVE PROGRESS' POPUP** settings menu item and click the **SLIDER BUTTON** to the right.



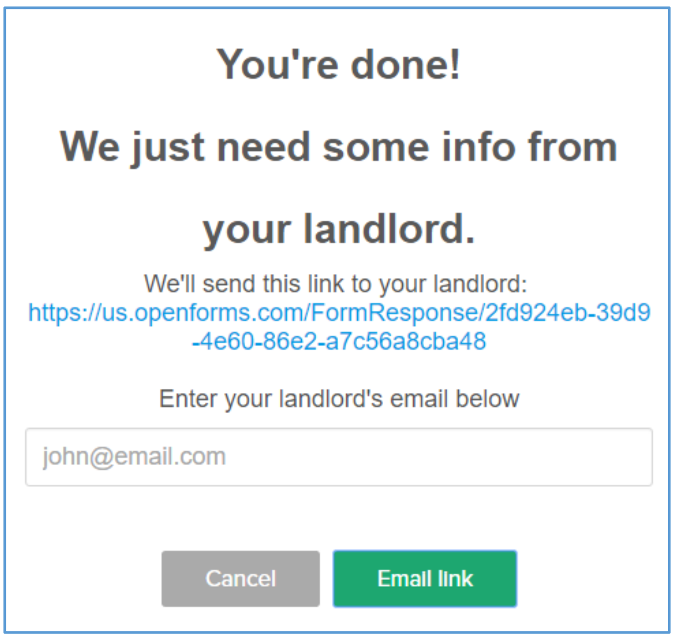
You will need to edit most – maybe even all – of the **FIELDS** in this section so that they make sense for your situation. Reference the two images below to see which field changes which piece of the popup the customer sees in the form.

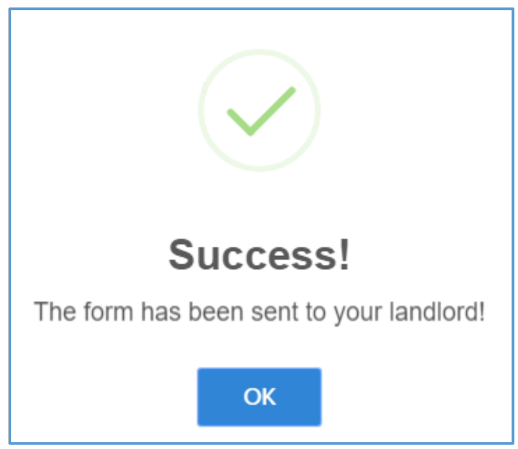
7





After making updates, the customer will see this:

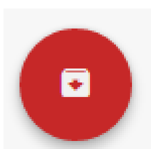
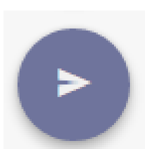
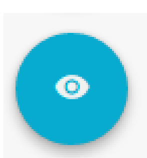
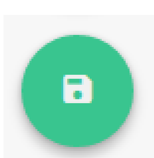




SAVING, PREVIEWING, PUBLISHING, AND ARCHIVING

When creating a new form, there will be four buttons at the bottom-right of your screen. When editing a form that is already published, there will be three.

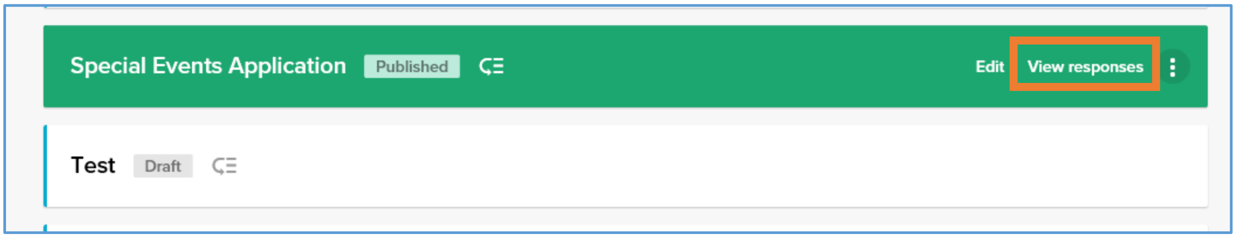
NEW FORM **EXISTING FORM**

FORMS MANAGEMENT BUTTONS		
Button	**Button Name**	**Use This When…**
	Archive	You want to delete forms. You should archive forms, not *actually delete* forms. Think of this as *retiring* the form: when you will no longer use a form on the website, archive it.
	Publish	You are done creating a form and need to add it to the website. Until you press publish, the public can't see your form. The GR Digital Team is responsible for publishing all completed forms.
	Preview	You want to see what your form will look like to your customers. You can use this for both unpublished forms and published forms that you are editing.
	Save	You need to save changes you made to your form. You should use this button constantly. If your computer crashes and you haven't saved, you will lose all of your work. ***Save often***.

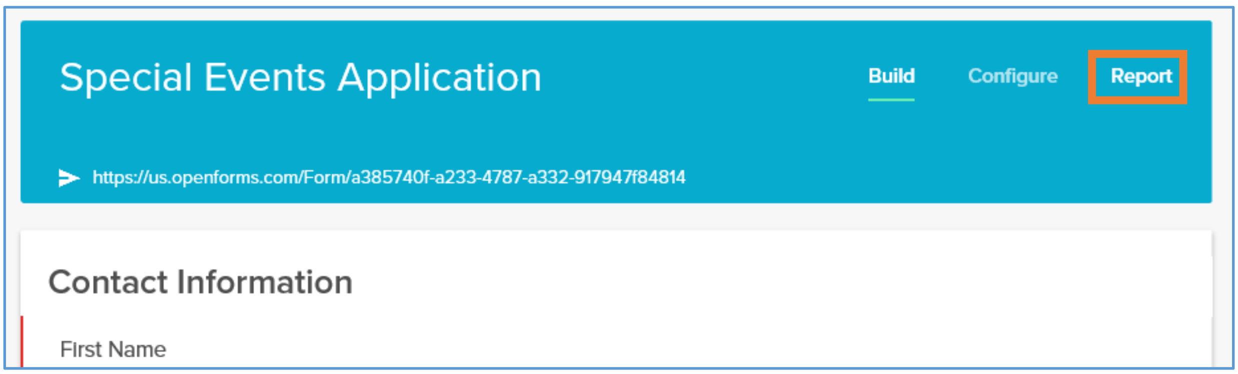
FORMS RESULTS

After you've published your form and linked to it on or embedded it in your webpage, customers will start using it. For some forms, you can change the settings to Receive Notification for Submissions. For forms that will get a high volume of responses, this is not practical.

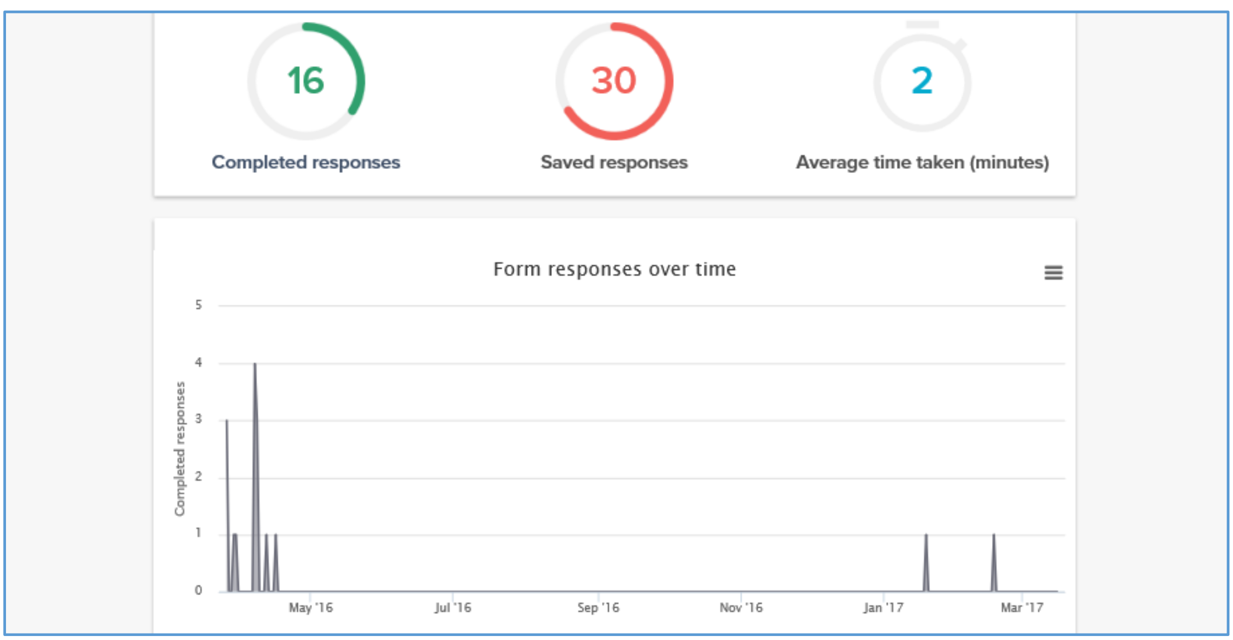
There are two ways to access a form's results. The fastest way is to log in, find the form in the form library, and click **VIEW RESPONSES**.



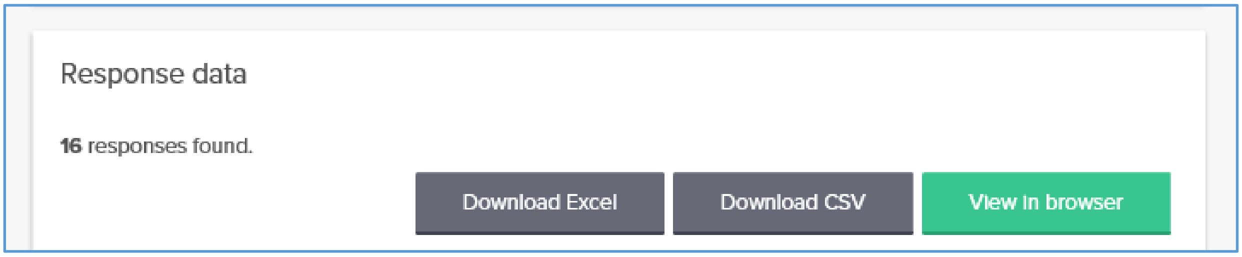
You can also access the results from within the form editor. Just click on **REPORT** from the form title header.



This takes you to an overview of customer submissions over time.



To export or view all of the form's results. Scroll to the bottom of the page and select one of the options: **DOWNLOAD EXCEL**, **DOWNLOAD CSV**, or **VIEW IN BROWSER**.



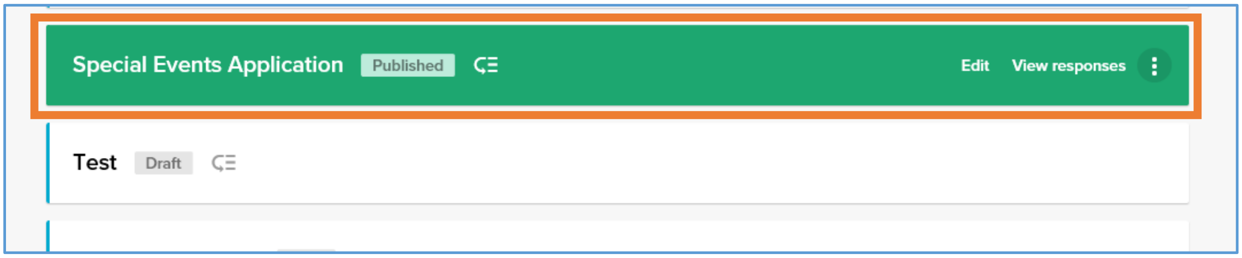
Now you have all of your customers' information, and you can do any work necessary to process applications, transactions, service requests, etc.

FORMS SETTINGS

All users with permissions to create forms have access to at least some of the Forms Settings. This section details each of the settings areas and the functions available within each of them. Only administrators have access to all of these settings, but every OpenForms user will have some access.

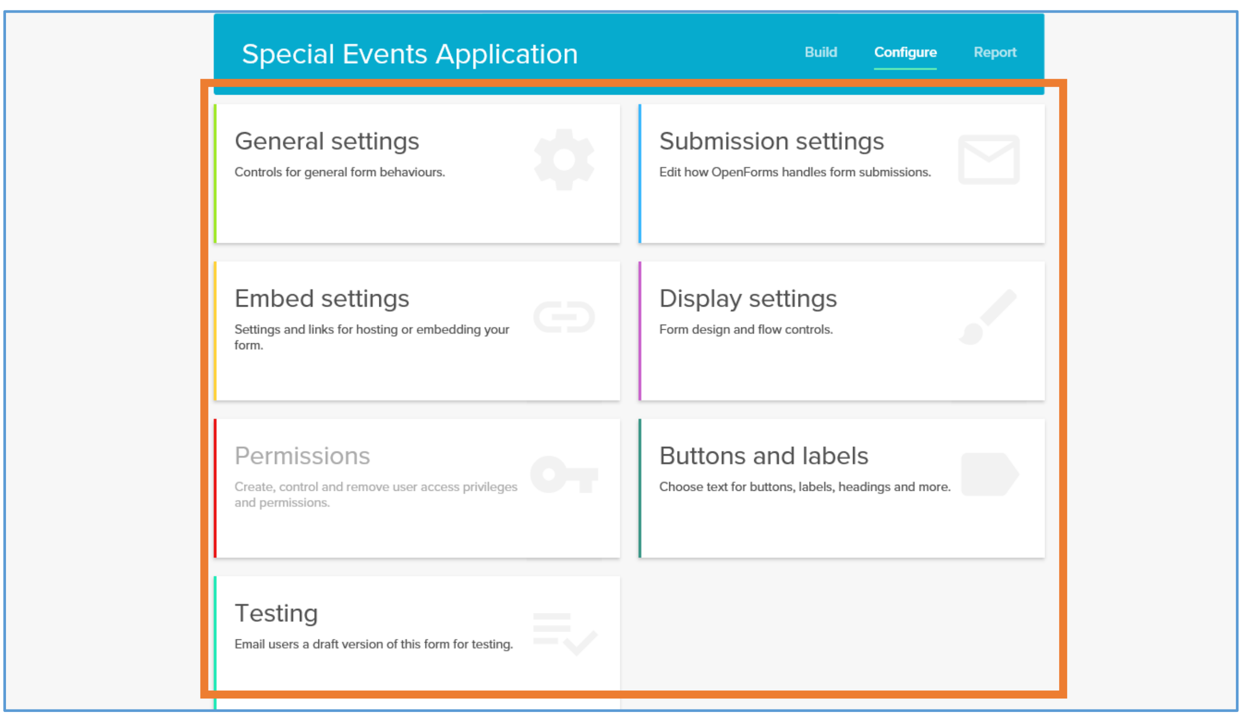
ACCESSING FORM SETTINGS

To access a form's settings, first find your **FORM** in the library and click to open it.

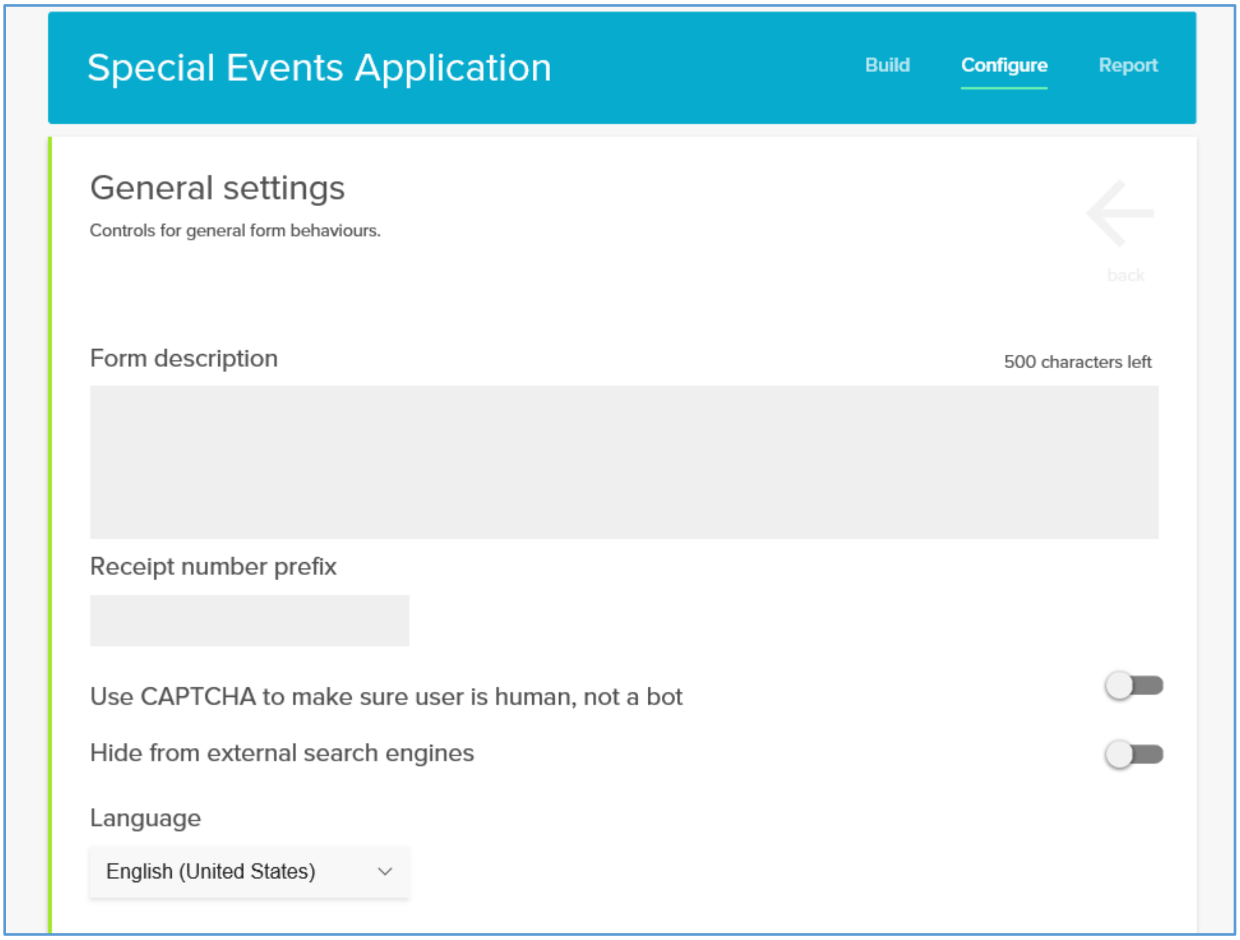


Click **CONFIGURE** at the top right of your form title header to access the settings.

Now you can see the **FORM SETTINGS CATEGORIES**.

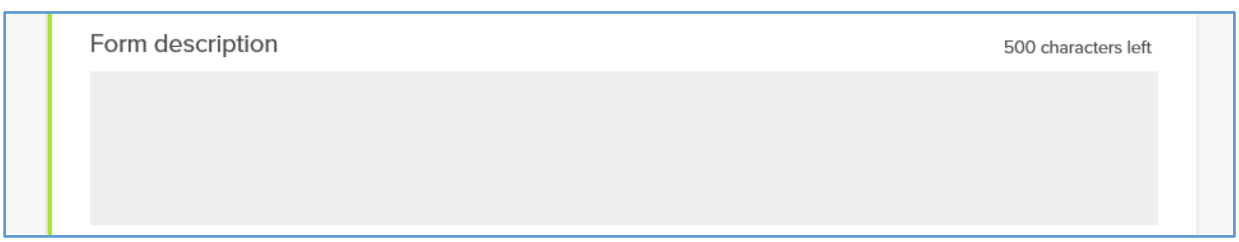


GENERAL SETTINGS



FORM DESCRIPTION

This section allows you to enter a short description of your form. This is for internal use only: customers will not see the form description anywhere. Think of this as an opportunity to ensure continuity in service if you move to a different position or leave the organization.



RECEIPT NUMBER PREFIX

Every time a customer submits a form, their submission is assigned a receipt number. You can enter a prefix – any combination of numbers and/or letters – here. This could be a department identifier, or anything you want.

CAPTCHA ON/OFF

This feature allows you to add a CAPTCHA at the end of your form. This will ensure that all forms are submitted by real, human customers. This helps prevent spam and other cyber attacks.

This is what customers will see at the end of the form if you enable this feature:

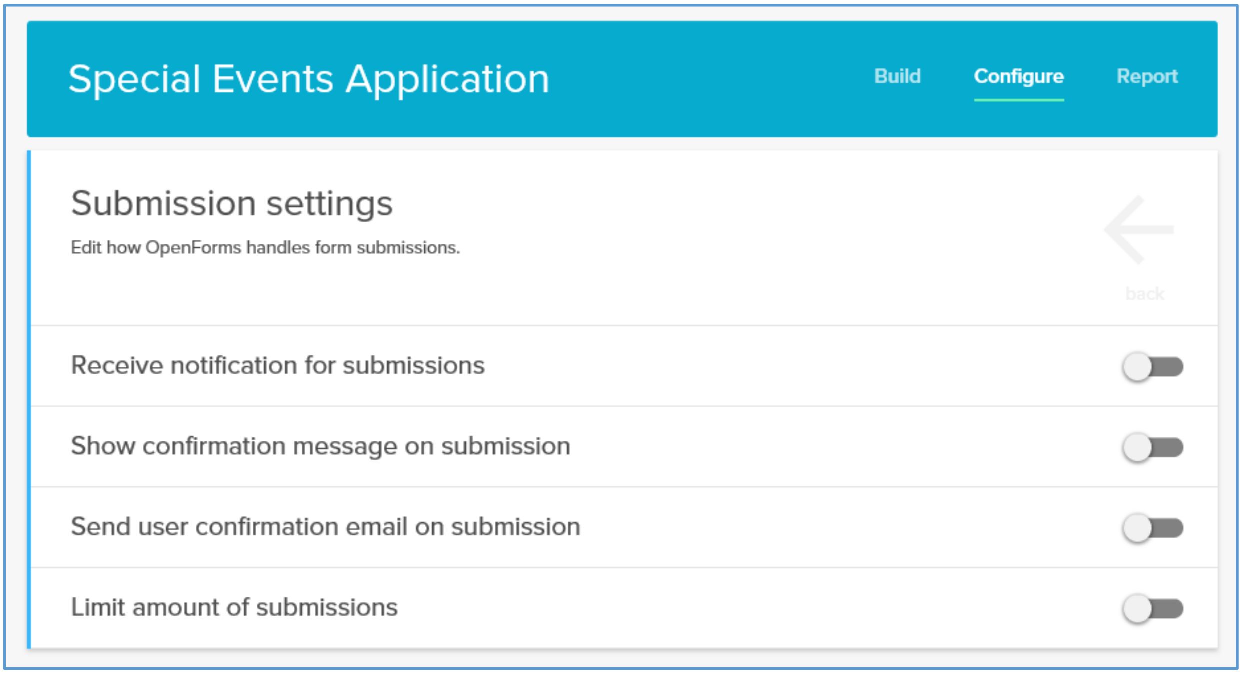
HIDE FROM EXTERNAL SEARCH ENGINES ON/OFF

If you turn this feature on, no one can find your form using Google or any other external search engine. Basically this means that users will only be able to find your form if you give them the link.

LANGUAGE

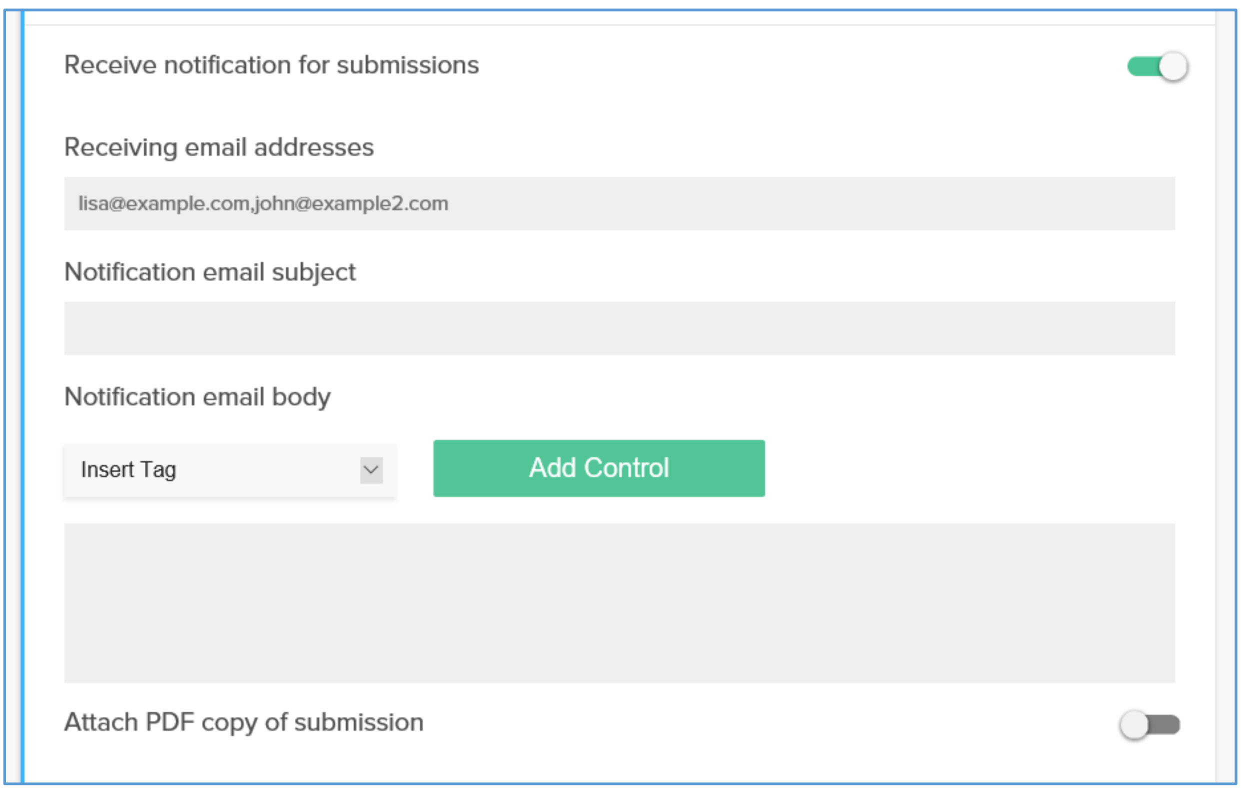
You can set the language here. For the most part you won't need to do this unless you are an administrator uploading Spanish language versions of forms.

SUBMISSION SETTINGS



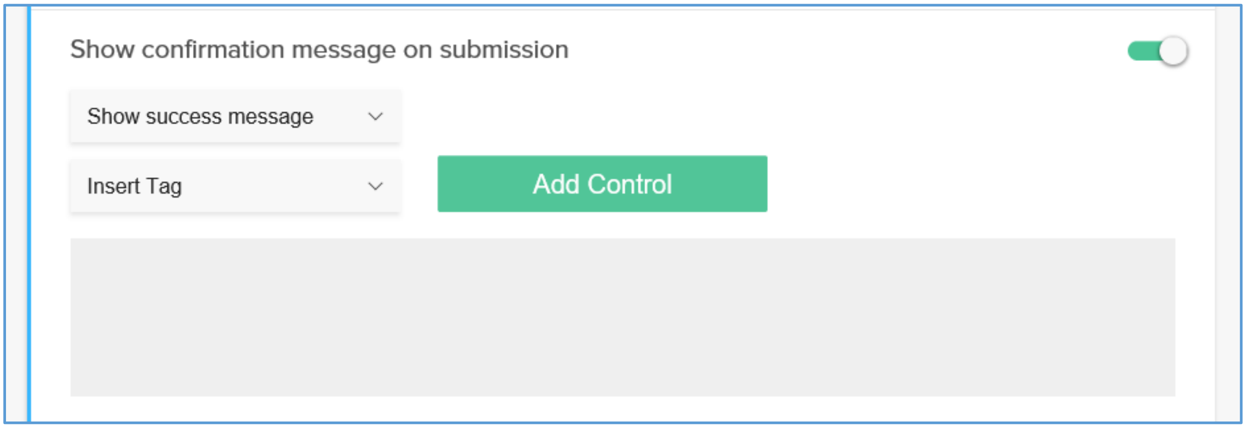
RECEIVE NOTIFICATION FOR SUBMISSIONS

This setting allows you to setup email notifications to one or more employees. They will receive an email each time a customer submits a form. You can even change the settings to attach a PDF version of the completed form to each email notification.

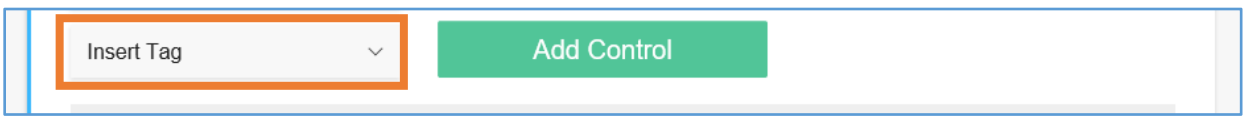


SHOW CONFIRMATION MESSAGE ON SUBMISSION

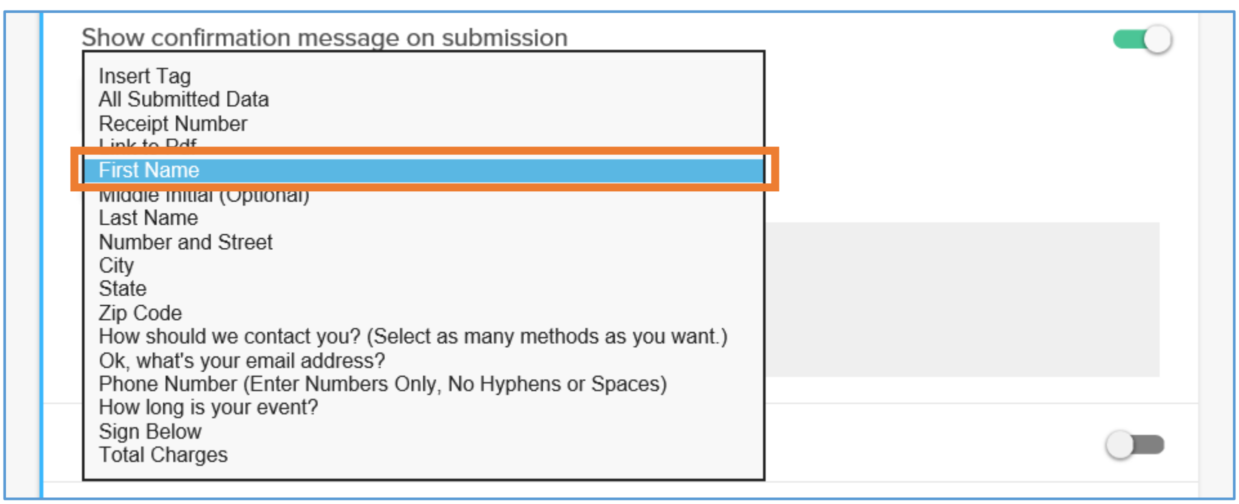
Using this setting, you can setup a message to display to customers every time they submit a completed form. You can even personalize the message to include their name if you collect it in the form. (See below.)



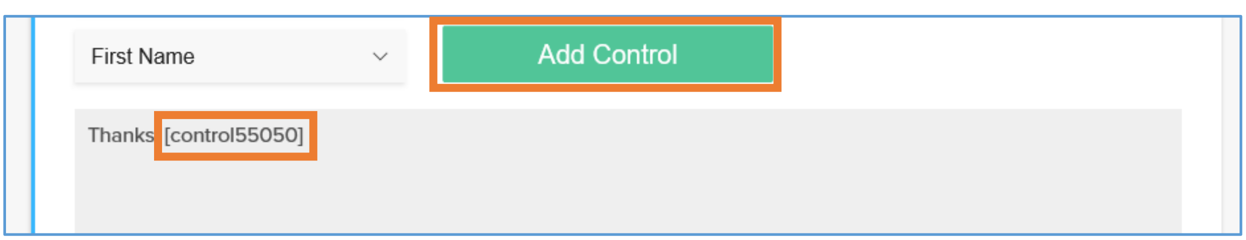
To include a field that the customer entered in the message, like first name, use the **INSERT TAG** dropdown menu.



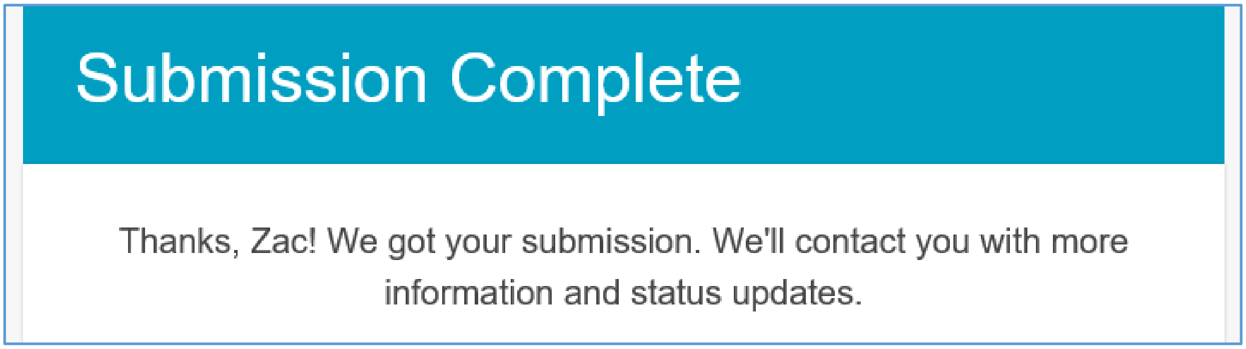
Choose the appropriate **FIELD** from the dropdown Menu.



Click **ADD CONTROL**, and the **FIELD CONTROL** will appear in your message text.

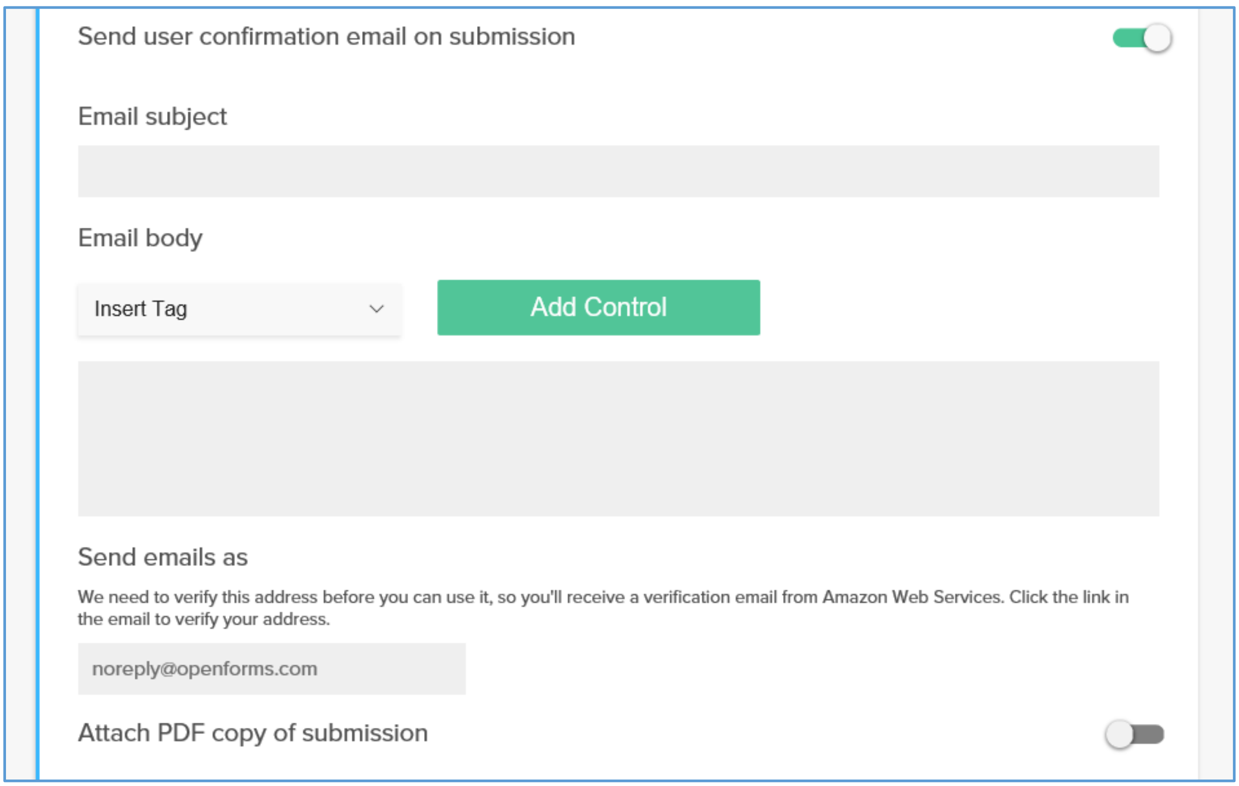


Finish typing your message. Now when customers submit their forms, they will see your message!

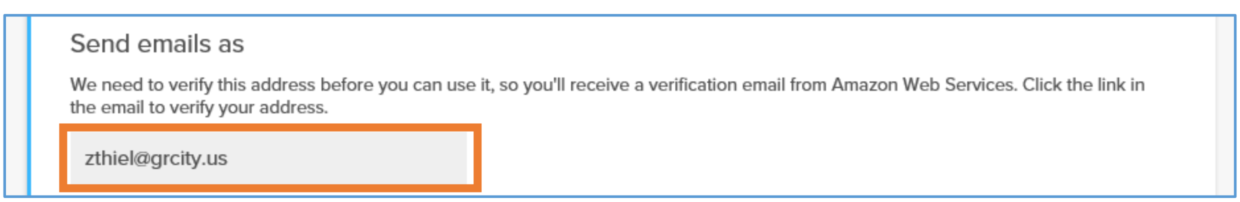


SEND USER CONFIRMATION EMAIL ON SUBMISSION

Toggling on this setting allows you to send an email to users confirming that their completed form was submitted. The features work similarly to those of the confirmation message discussed above.

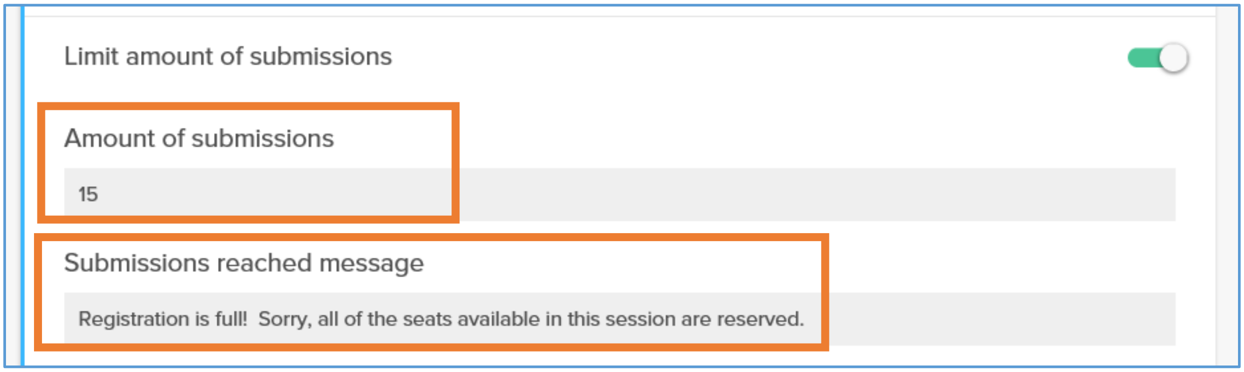


One important note here is that you can change the **EMAIL ADDRESS** that the confirmation email is sent from. This is useful because if the customer replies, the reply goes to the appropriate inbox.



LIMIT AMOUNT OF SUBMISSIONS

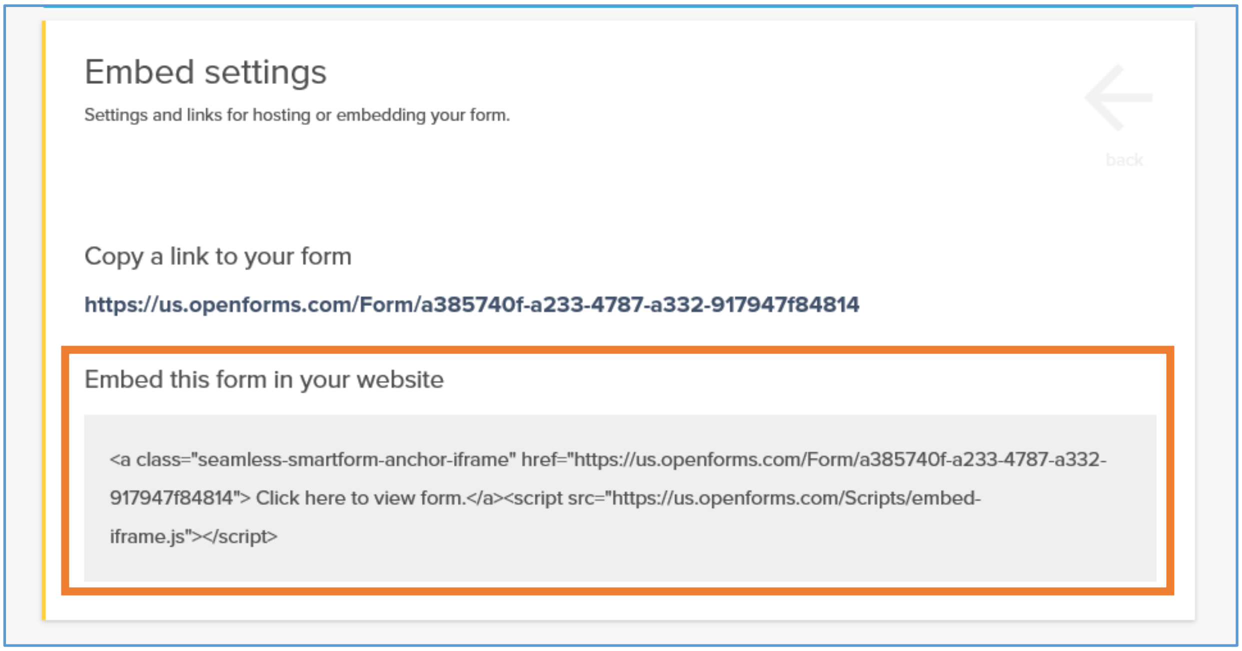
Turning this feature on allows you to limit the number of submissions accepted. This is useful for training sessions or other events with limited seating available. Simply enter the **NUMBER OF SUBMISSIONS** you need to limit the responses to and enter a **MESSAGE** users will see when the limit is reached.



EMBED SETTINGS

The embed settings help you share your form with your customers. You can copy the link provided and insert it into a hyperlink on your webpage,

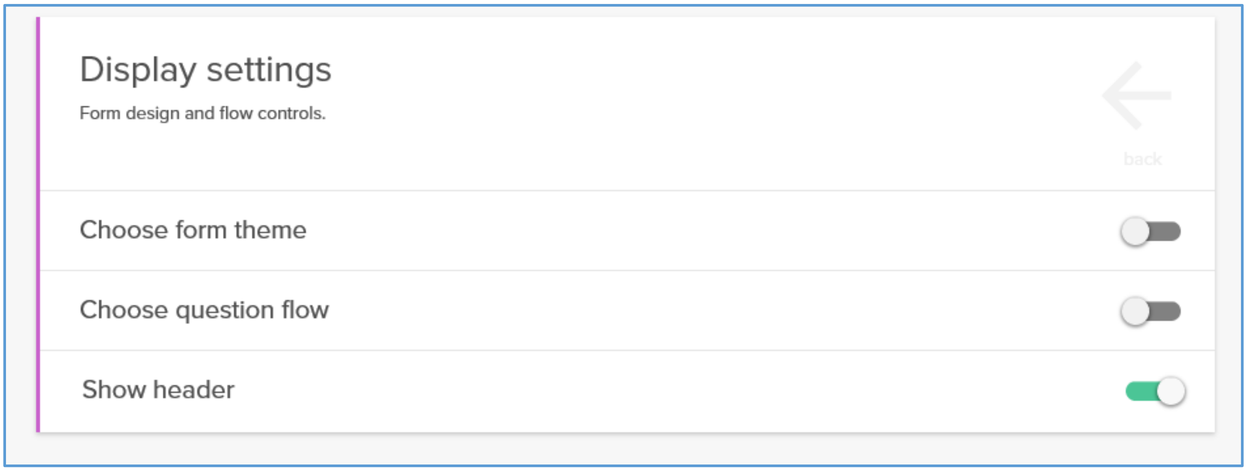
The **EMBED THIS FORM IN YOUR WEBSITE** is an advanced feature used by the GR Digital Team to place your forms on the City website.



DISPLAY SETTINGS

The display settings allow you to change the look, feel, and navigation of your forms. These settings should not be used without instruction or direction from the GR Digital Team.

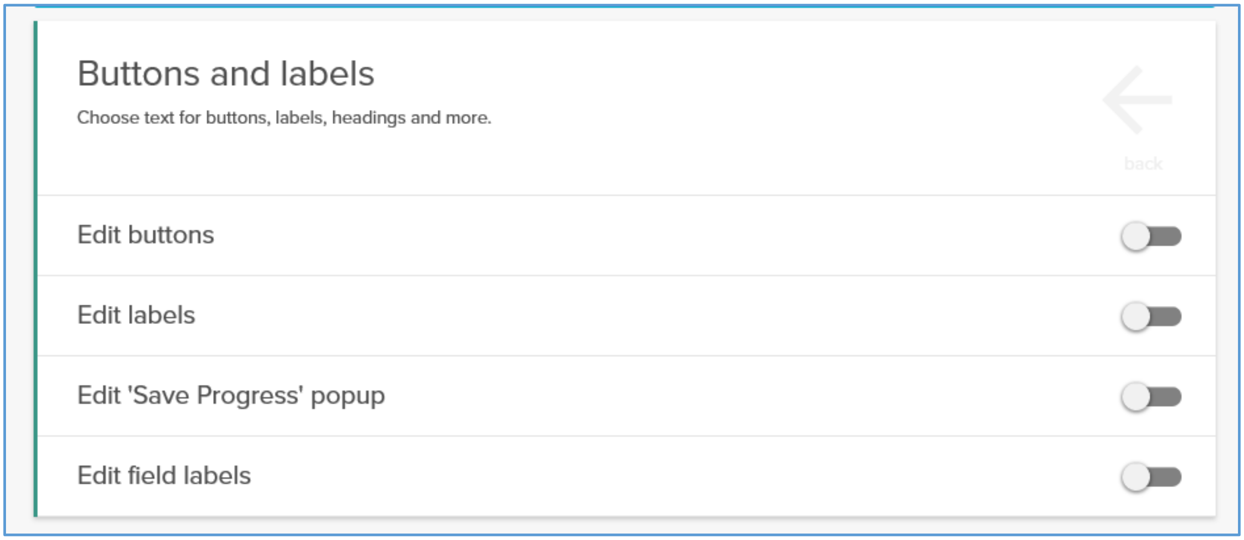
The GR Digital Team reviews and approves all forms before they are published to the web. Forms that do not meet the City's standardized look and feel will be rejected and sent back to you for modifications until these standards are met.



BUTTONS AND LABELS SETTINGS

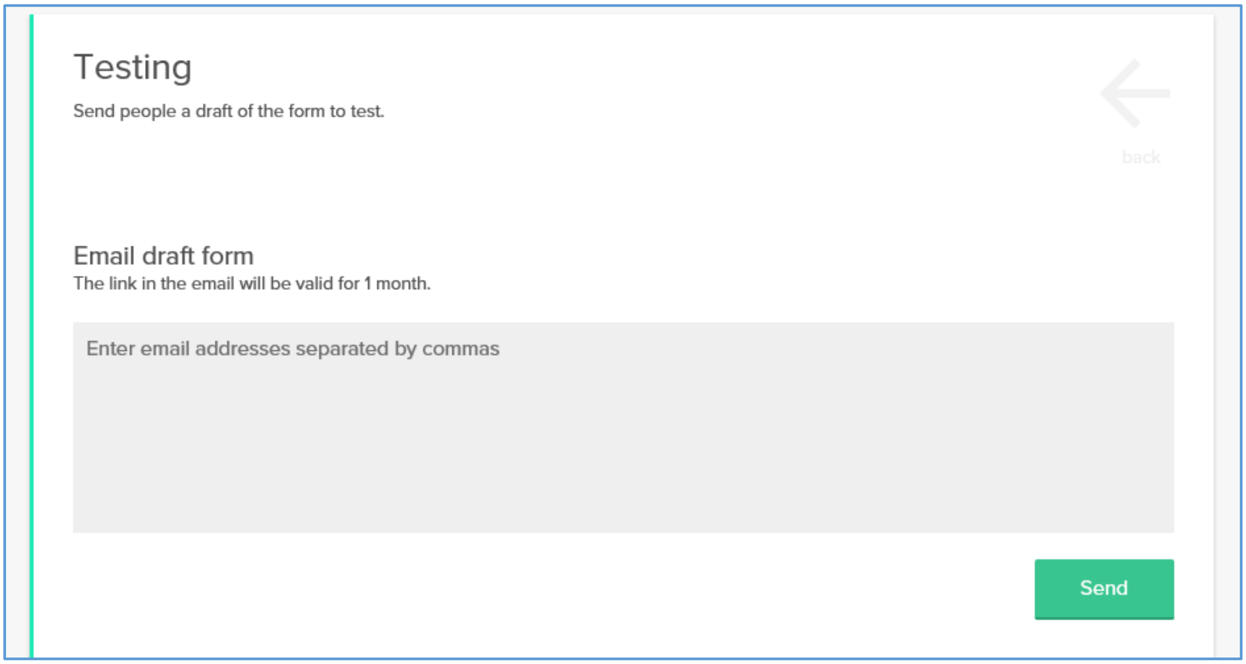
See Editing Button Labels in the Building Forms section for details on buttons and labels settings.

You should only change button labels in specific situations. If your buttons and labels edits do not meet the City of Grand Rapids' digital standards, as established by the GR Digital Team, your form will be rejected and returned for revisions until the standards are met.



TESTING SETTINGS

The testing settings simply allow you to send a pre-published version of your form to any email address for feedback and suggestions for improvement. Simply enter email addresses and click send!



OPENFORMS | CONTENT IN FORMS

OVERVIEW

·SIMPLE·
·SEPARATED·
·CLEAR·

We use forms for collecting information, but sometimes we need to explain a process or provide information within a form. You should follow these general rules for content within forms:

- Keep it simple: if you need two paragraphs of text, it belongs on a webpage – not in your form.
- Separate detailed instructions into lists: make it easier for your customers to read and understand.
- Use clear language: follow the City's voice and tone guidelines. Avoid government/industry jargon.

HEADER

·TITLES FOR SPLIT FIELDS·
·SECTIONS WITHIN SECTIONS·

Headers are used as titles in specific situations:

- When you are asking for information that is split into different fields (name, address, etc.)
- When you have a smaller section within a single section of a form


Your Address

Number and Street required

300 Monroe Ave NW

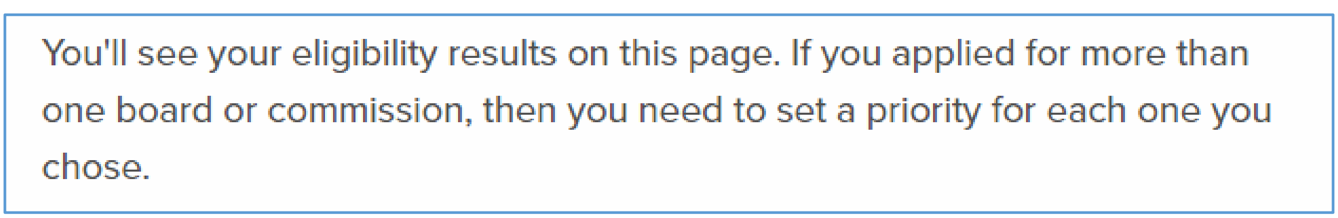
City required

PARAGRAPH

·PROVIDE INFORMATION·
·KEEP IT SHORT·
·LINK TO WEBPAGES·
·CONSISTENT VOICE & TONE·

Use paragraph fields to provide short pieces of information.

- Don't overload the customer with information: keep it short. A customer using a form likely went there to get something done. Requiring too much reading in the form could drive them away.
- If you need to give the customer detailed policy information, use the paragraph field to add a hyperlink to the appropriate webpage.
- Use approachable but professional language, as detailed in the voice and tone guidelines.


You'll see your eligibility results on this page. If you applied for more than one board or commission, then you need to set a priority for each one you chose.

The above paragraph gives a clear and short explanation to the customer. Detailed instructions follow in a list.

LIST

·BULLETED LISTS·
·DETAILED INSTRUCTIONS·
·SEPARATE INTO STEPS·

Use list to break down complex descriptions, processes, instructions, etc. into more manageable pieces.

- This helps the customer quickly understand information simply by scanning your text.

What does this board do?

- 4 members representing each of the City's 3 wards
- 1 City Commissioner sits on this board
- Makes and oversees the rules of the City's civil service hiring system

IMAGES

·NOT FOR DESIGN·
·DESCRIPTIVE·

<u>Do not use images as a design element of your form</u>. You should only use images to describe a piece of the transaction or service.

- For a good example, think of someone reporting a sidewalk that needs to be repaired.
- It could be because of a raised crack or several cracks in the sidewalk
- It could also be because of something called *spalling*
- Few people know what spalling is, so it is useful to show the customer an image of spalled concrete

OPENFORMS: BUILDING A FORM

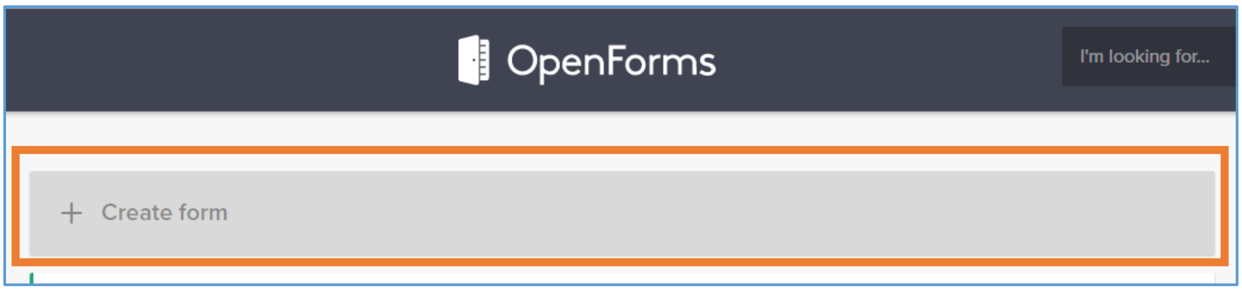
PUTTING THE PIECES TOGETHER

Now that you have learned the basic functions of the most important parts of OpenForms, it's time to put all the pieces together and build your own forms.

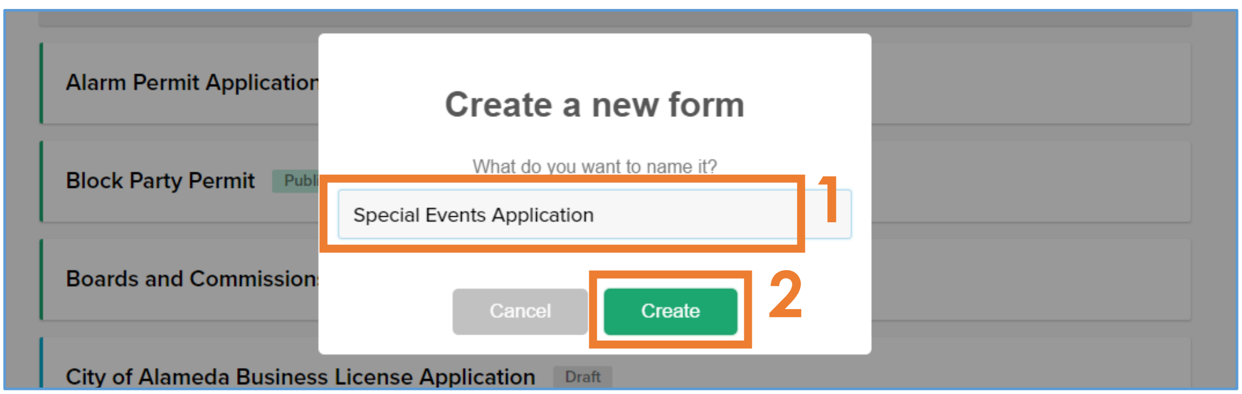
It's helpful to follow an example to understand the whole process. In this section, we'll create a form for Special Events applications.

GETTING STARTED

Log in to OpenForms and click **+ CREATE FORM**.

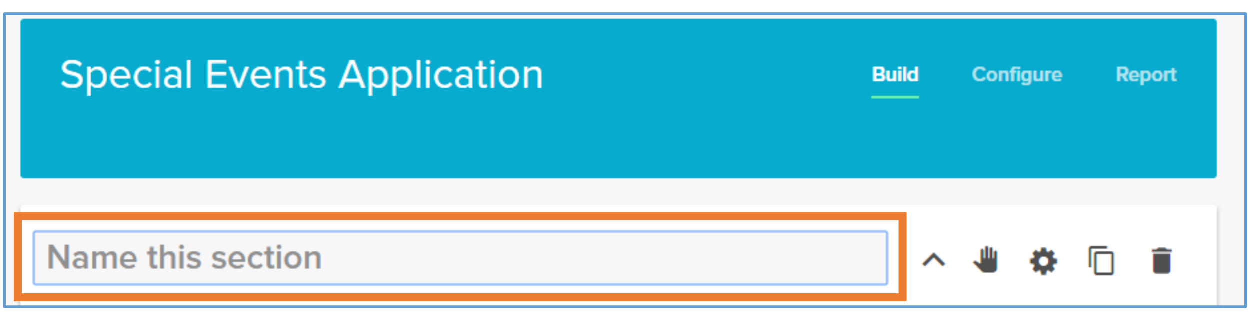


You will be prompted to give your form a **NAME (1)**. Name it, then click **CREATE (2)**.

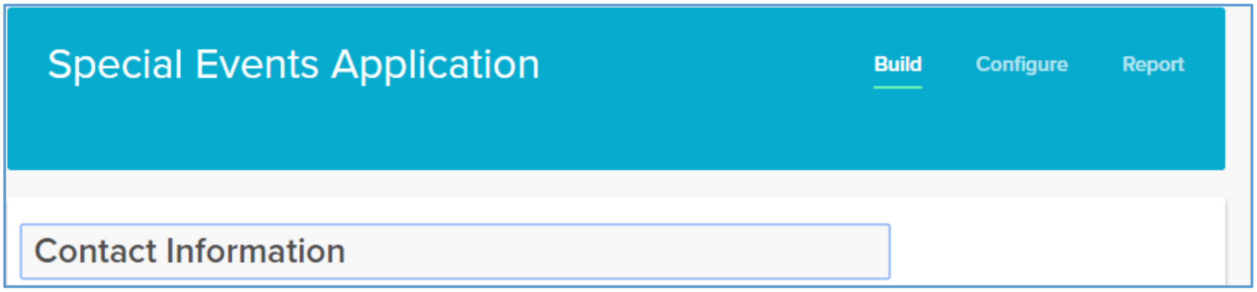


ADDING THE FORM FIELDS

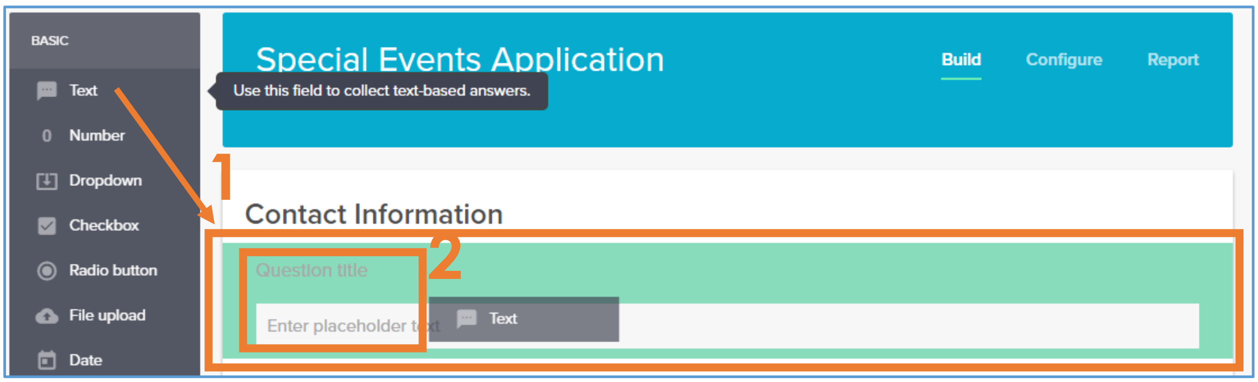
Now we are in the form editor. Name the first section by clicking **NAME THIS SECTION**.



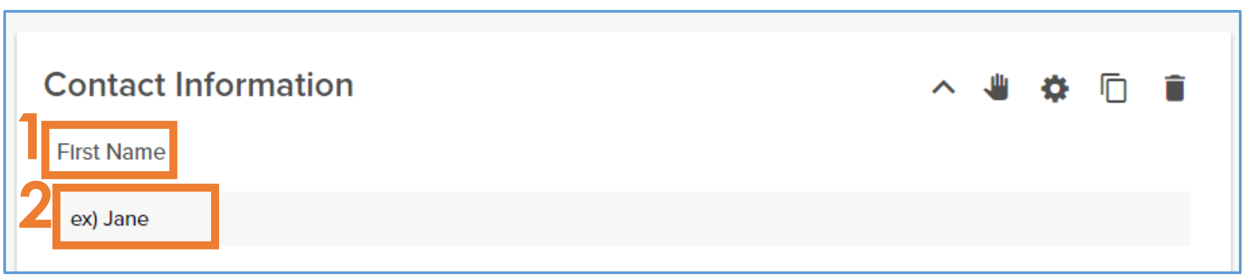
In this example the first section is titled *Contact Information*.



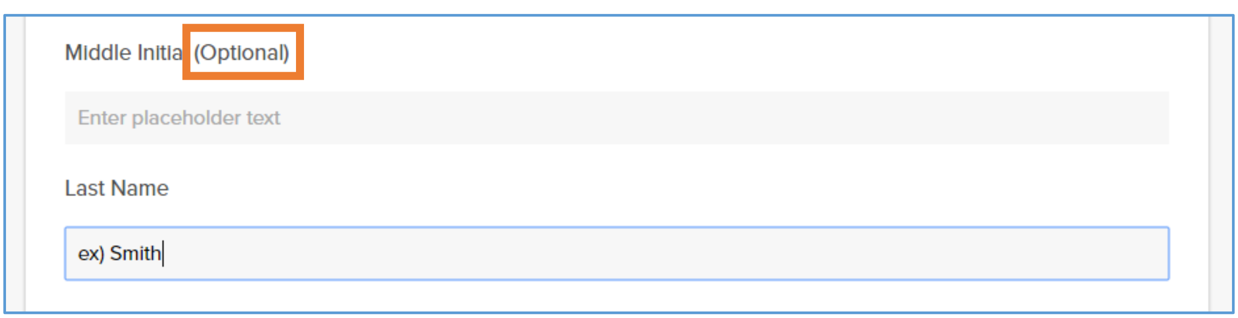
Next, we add a **TEXT FIELD (1)** by dragging and dropping a text field below the section title. Then, we click the **QUESTION TITLE (2)** to change it to ask for the contact's name.



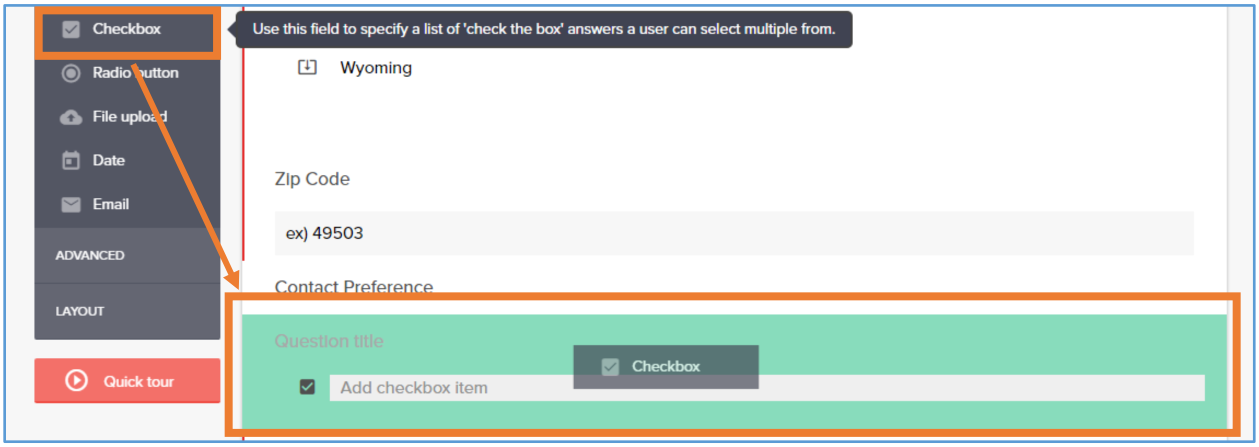
We need to change the **QUESTION TITLE (1)** and **PLACEHOLDER TEXT (2)**. Placeholders show the customer how we expect them to enter their information. This will minimize errors and make the data collected more easily sorted and analyzed.



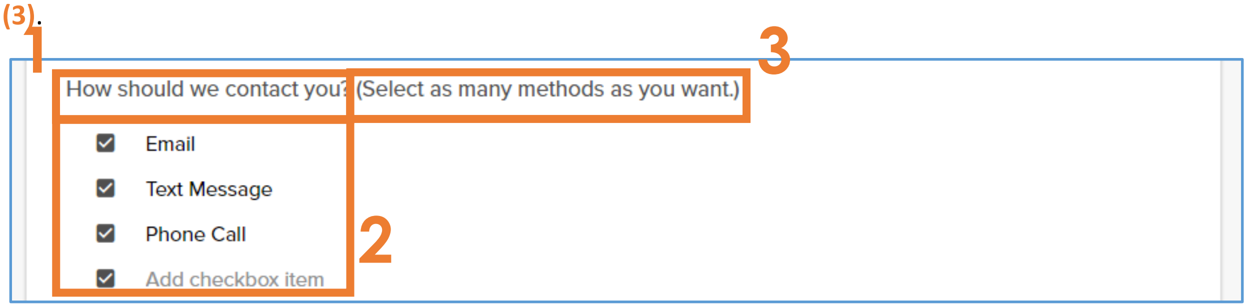
Next we add another text field requesting the applicant's middle initial and last name. We follow the same process as the above. If a field is **OPTIONAL**, let the customer know in parentheses in the question title.



When getting contact information, it is a good idea to ask the customer how they prefer to be contacted. Because they may prefer more than one type of contact, the **CHECKBOX FIELD** works best for this question.

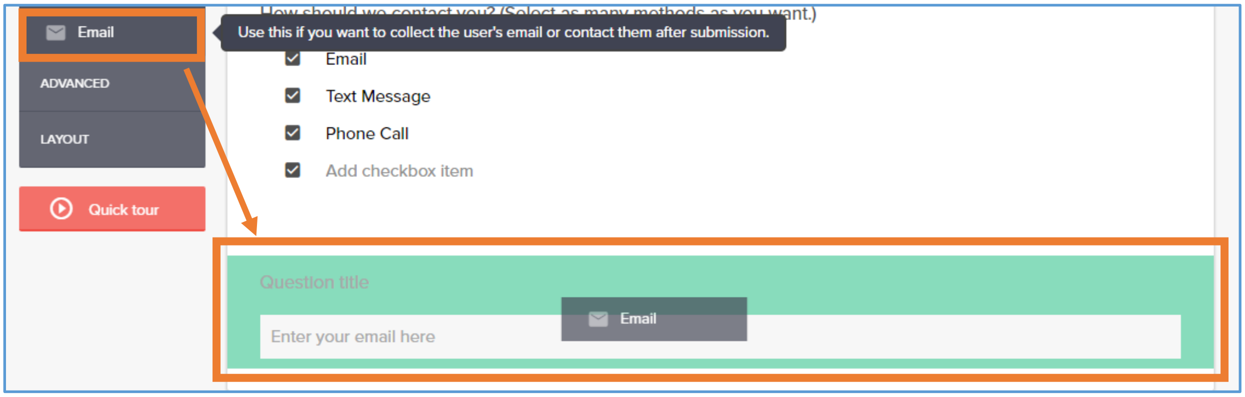


Change the **QUESTION TITLE (1)** and add each **CHECKBOX ITEM (2)**. With Checkbox fields, you should always let the customer know that they can select more than one. Add this **ADDITIONAL INFORMATION (3)**.

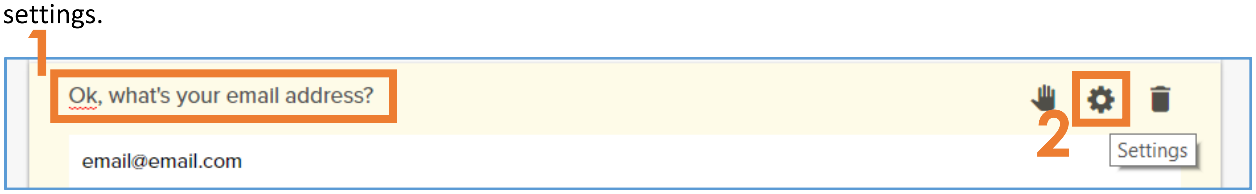


USING SMART LOGIC

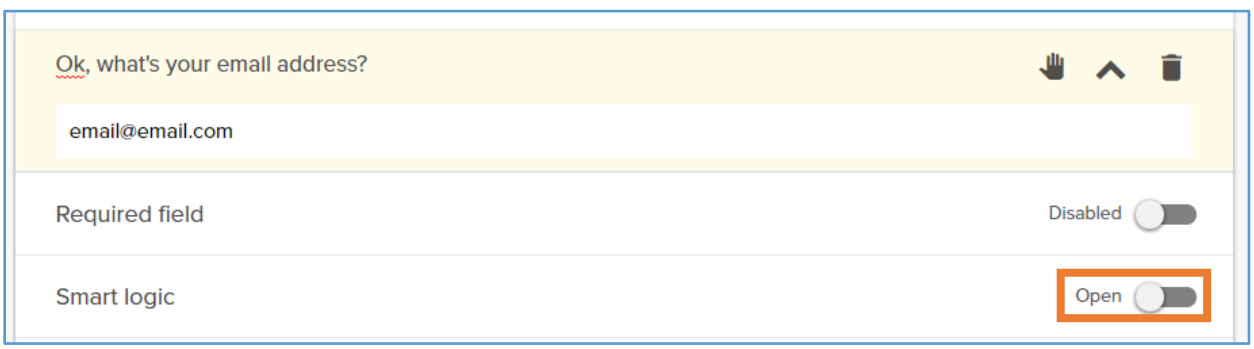
Now we need to ask for the customer's email address and/or phone number based on their response to this question. This is where smart logic is important. First, we will add an **EMAIL FIELD** for the customer's email address.



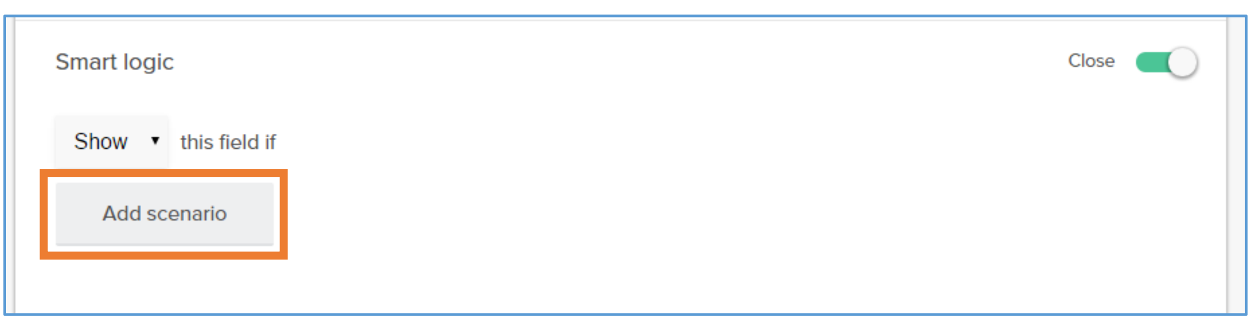
Next, we change the **QUESTION TITLE (1)**, then click the **SETTINGS ICON (2)** to change the smart logic settings.



Click the **OPEN SLIDER BUTTON** on the Smart Logic settings.

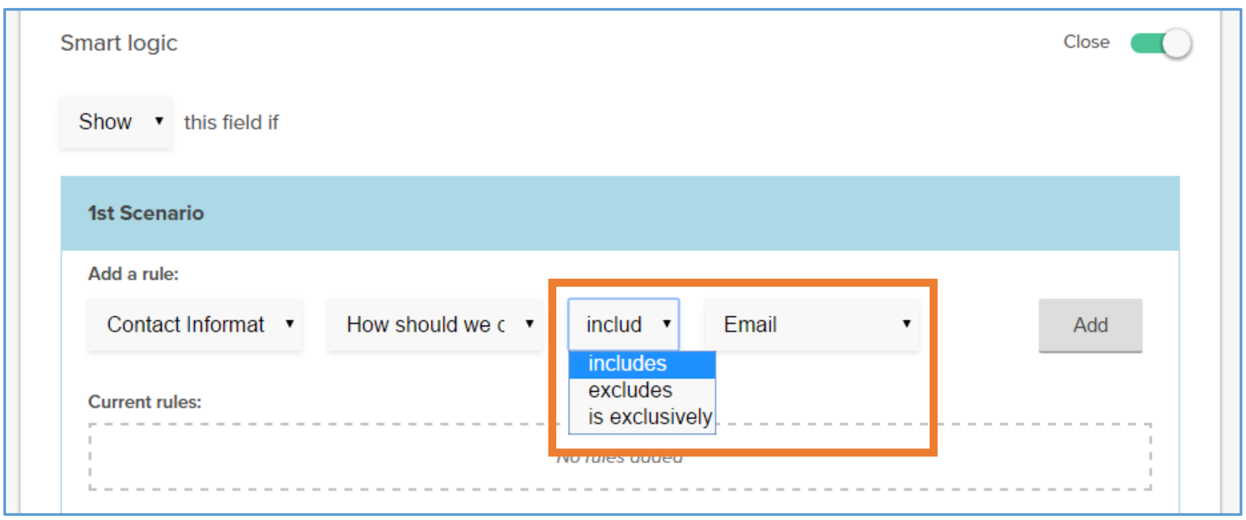


Click **ADD SCENARIO** to set this question to appear only if the customer selects Email from the checkbox question above.

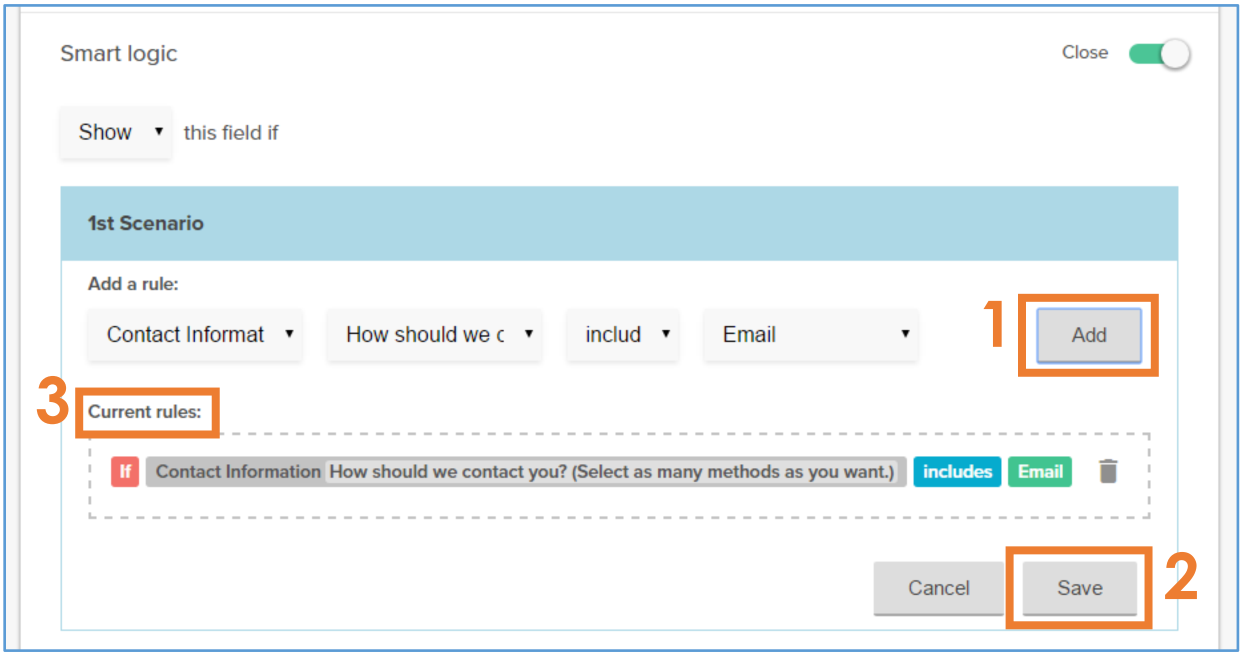


Now we need to tell the computer when to show this question based on the answer before. To do this we need to select the **SECTION (1)** the checkbox question is in and then select the **CONTROL QUESTION (2)** from that section.

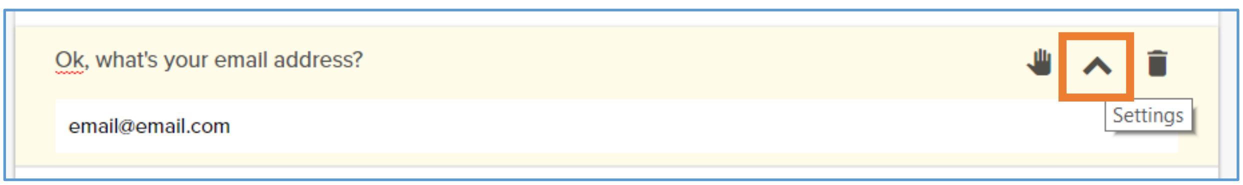
So, we select *Contact Information* and *How should we contact you?* from the section and control options. Two new boxes appear that allow us to actually set the rules that tell the computer to show this question. We want to ask for the customer's email if the previous answer **INCLUDES EMAIL**.



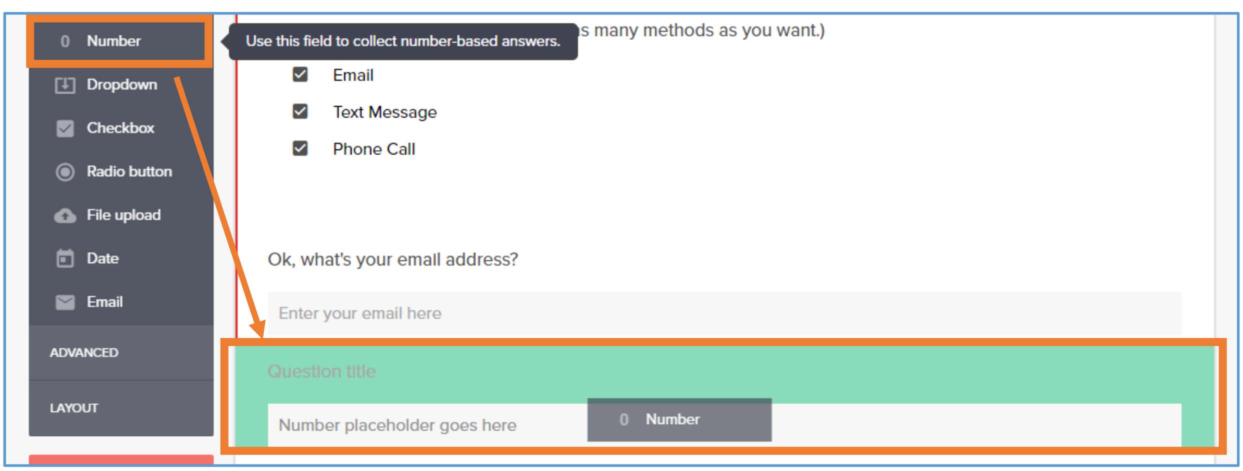
Now we click ADD (1), then we click SAVE (2). You have to click add before you click save, or you will lose your rule and have to start over again. If you see your rule in the CURRENT RULES (3) section, you are ready to click save.



To close the question settings, click the UP-FACING ARROW next to the question title.

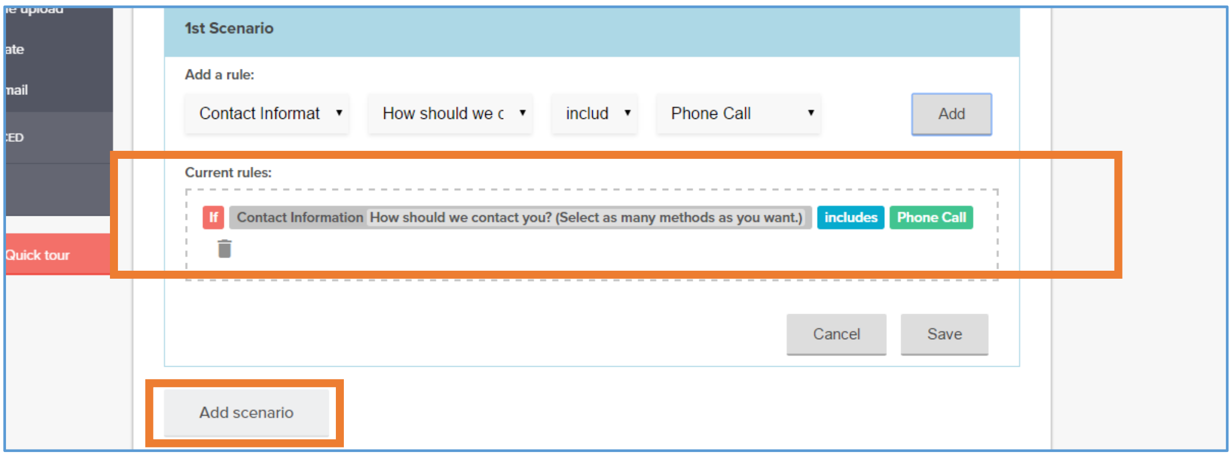


Now we'll add a NUMBER FIELD to collect the customer's phone number if they prefer contact by phone call or text message.



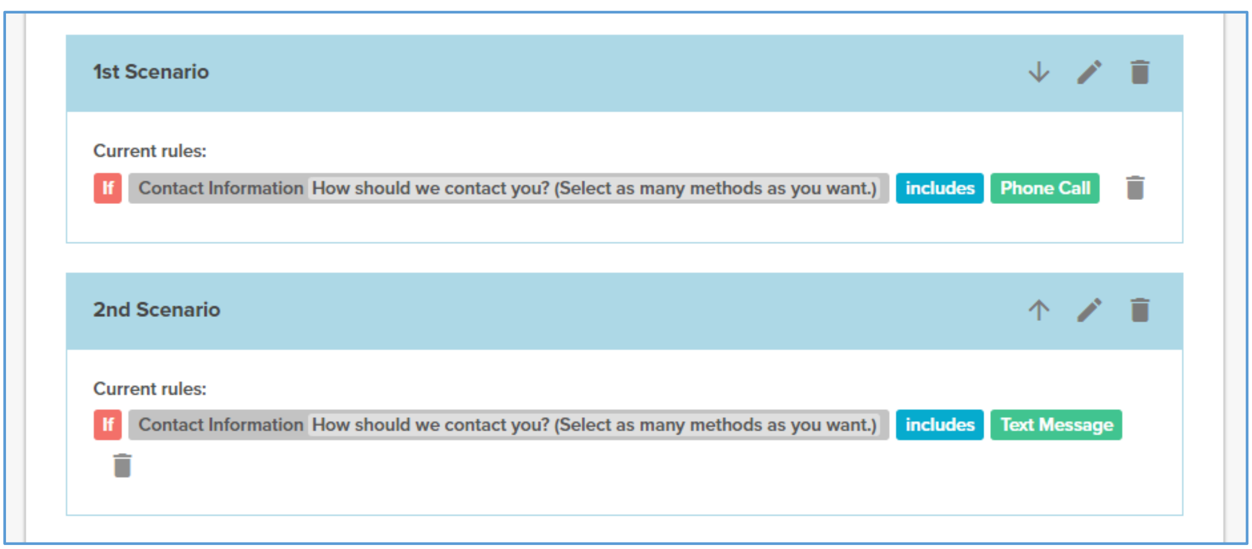
NOTE: It's best to use a number field to collect phone numbers and have the customer enter their number without any hyphens or other special characters. This makes it easy to send a text message to a large group.

We need to add the smart logic that tells the computer when to show this question as well. So we follow the same steps as before. Notice that we set the question to show when the customer's answer to the contact question was *Phone Call*, but we also need to show this question if the customer's answer includes *Text Message*. We need to click **ADD SCENARIO (1)**.

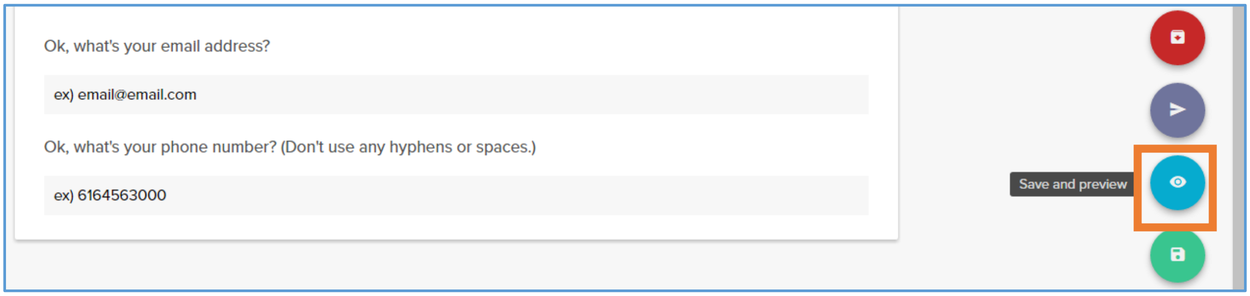


Note: If we add another rule to the same scenario, then the phone number question will only show if the customer selects <u>both</u> *Phone Call* <u>and</u> *Text Message*. When we add *Text Message* as a separate scenario, the question will show if the customer selected <u>either</u> *Phone Call* <u>or</u> *Text Message* <u>or</u> *both*, which is what we want.

Now we have set two separate scenarios that will show this question: if either the *Phone Call* or the *Text Message* boxes are selected in the previous question.



After saving your smart logic, you should **SAVE AND PREVIEW** your form to test the smart logic. If it isn't working, look at your smart logic settings to find your errors and fix them.

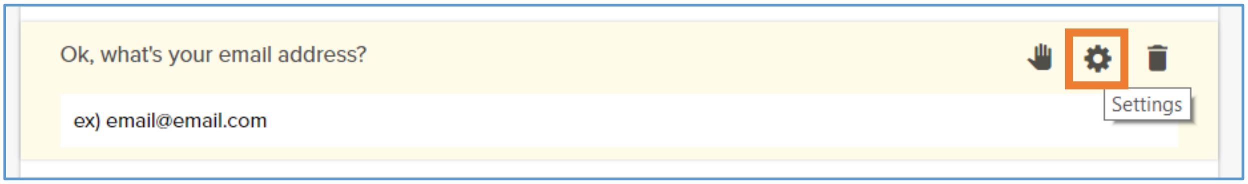


If your smart logic is working, you can move on to the next step in your form. For this example, the *Contact Information* section is almost complete.

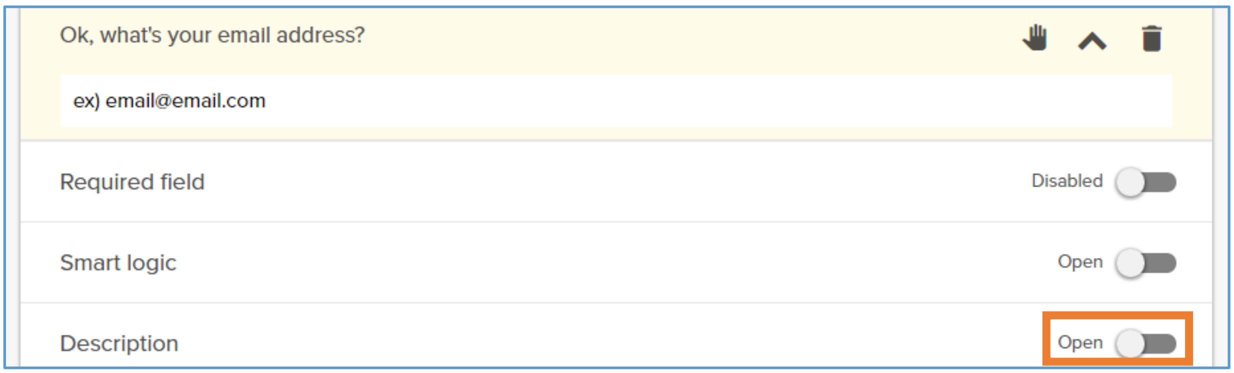
ADDING IMPORTANT COMMENTS IN FIELDS

There are times when adding additional comments to a form field is useful. Here's a good example of this: when we ask for an email address or phone number, we want to make sure that our customers know that we won't bombard them with messages unrelated to our service.

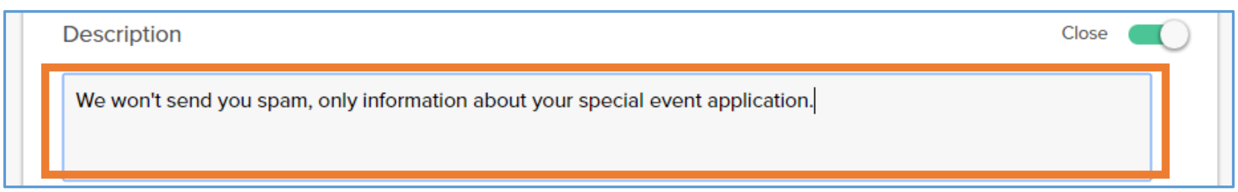
To add a message click on the **SETTINGS ICON** in the form field you are adding the message to.



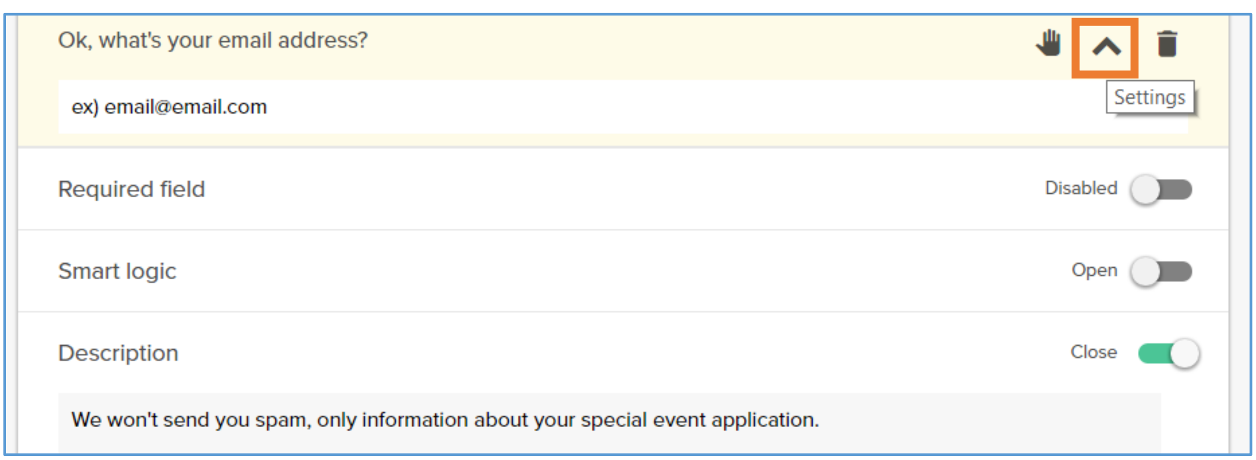
From the settings menu, click the Description **OPEN SLIDER BUTTON**.



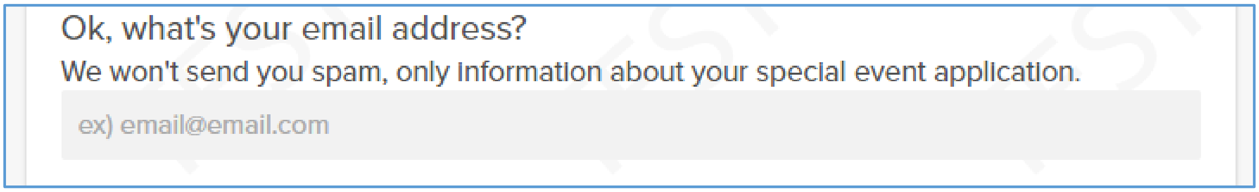
When you click below Description, a **TEXT BOX** appears, and you can type your message here.



When you're done typing your message, click the **UP-FACING ARROW** on the form field to close the settings menu.



When you preview your form after entering the description, you will see that it appears just below the question.

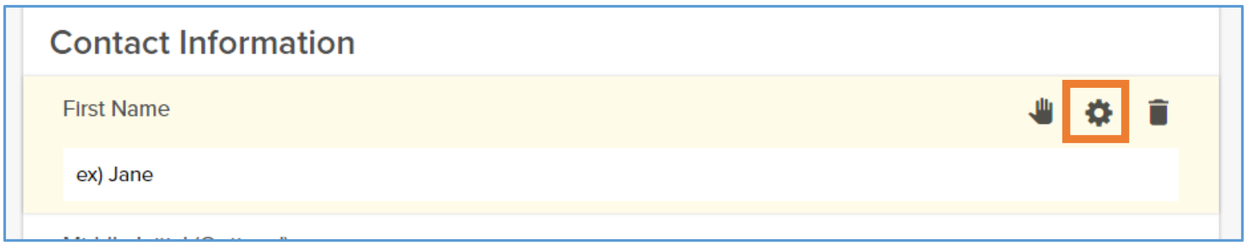


MAKING FIELDS REQUIRED

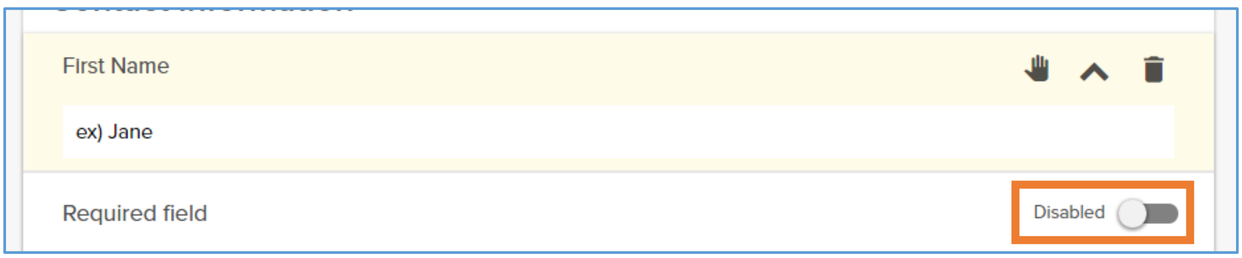
One of the greatest advantages of online forms over paper forms is that customers can't turn in an incomplete form. This is because we can require that certain fields be completed before allowing customers to move to the next section or submit their form.

In our *Contact Information* section, we need to require every field. We *have to know* the applicant's name, address, preferred contact method, and email and/or phone number.

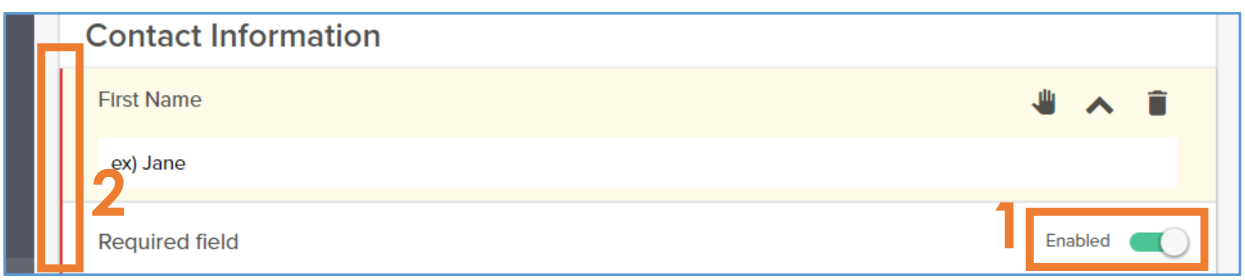
First, click the **SETTINGS ICON** for the field you need to make required.



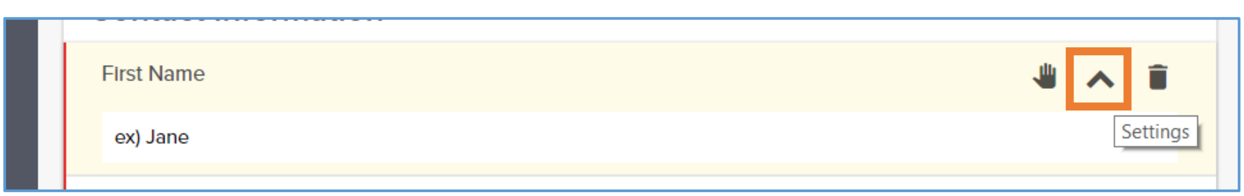
Required Field is the first option in the settings menu. Click the **DISABLED SLIDER BUTTON** to make a question required.



After clicking the button, its status will change to **ENABLED (1)**, and a **RED BAR (2)** appears along the left side of the field.



Close the settings menu using the **UP-FACING ARROW**.



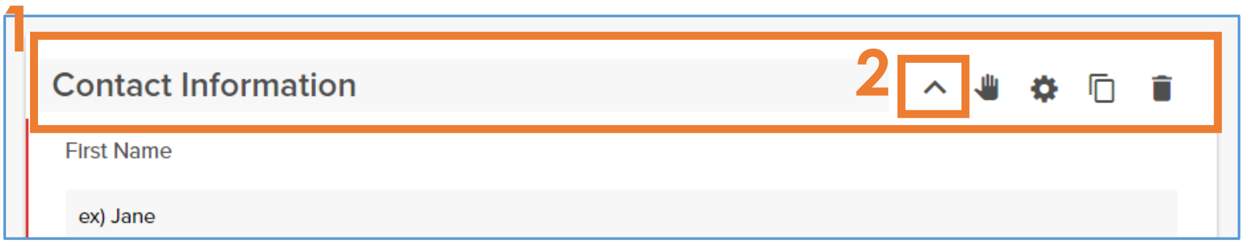
Repeat this process for every field that should be required in your form.

ADDING A NEW SECTION

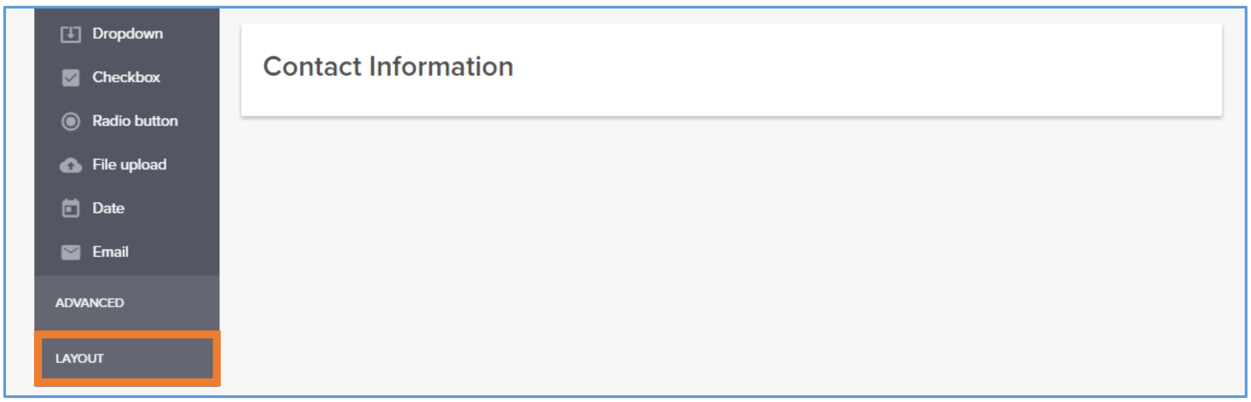
Using form sections serves two purposes: it makes it easier for you to stay organized when creating your form, and it makes the form more approachable for customers when there are natural breaks in the form.

The first thing you should do when you are adding a new section is hide the section you just finished. This will keep your workspace organized and clutter-free.

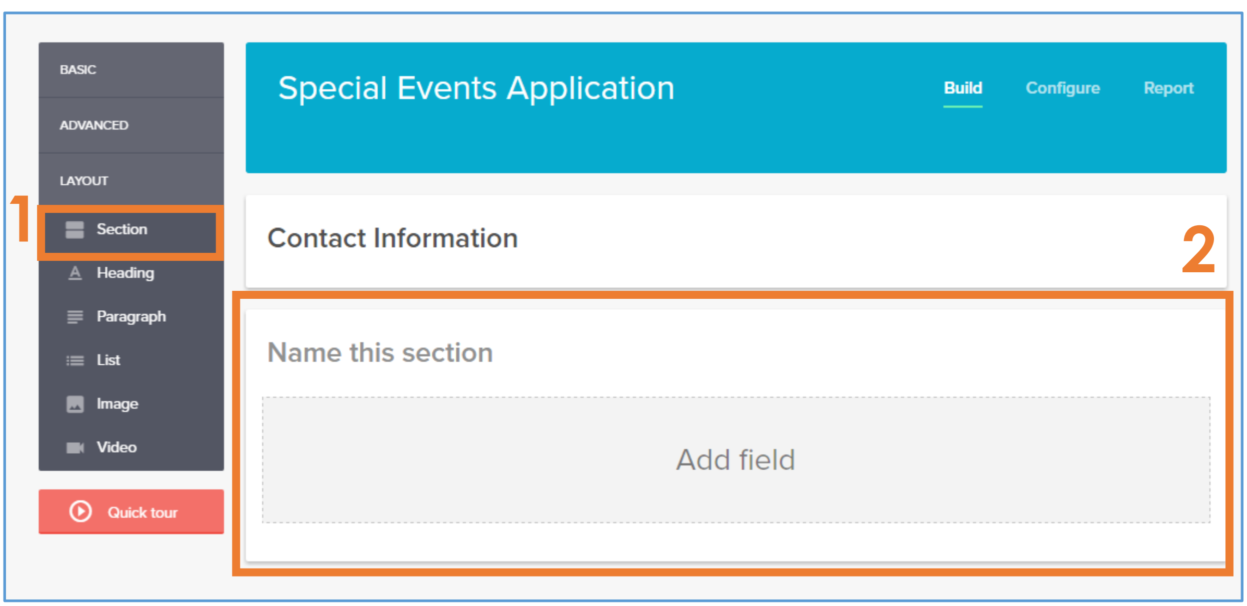
Hover over the **SECTION TITLE (1)** and click the **UP-FACING ARROW (2)** to collapse/hide the finished section.



Next, click **LAYOUT** to open the formatting tools.



Under layout, click **SECTION (1)**. A **NEW SECTION (2)** will be placed below all of your form's existing sections.

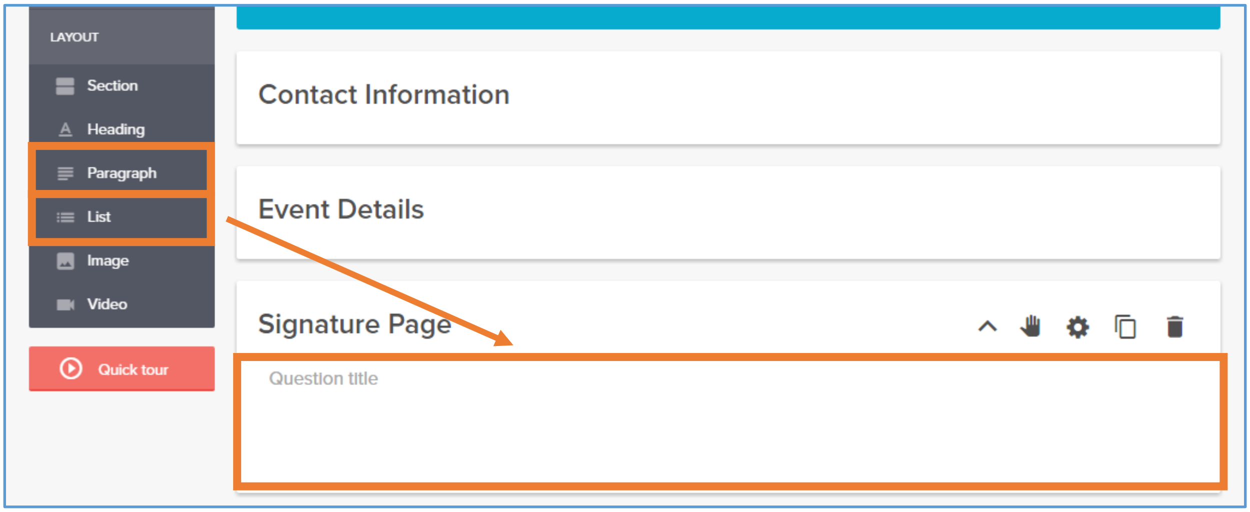


CAPTURING SIGNATURES

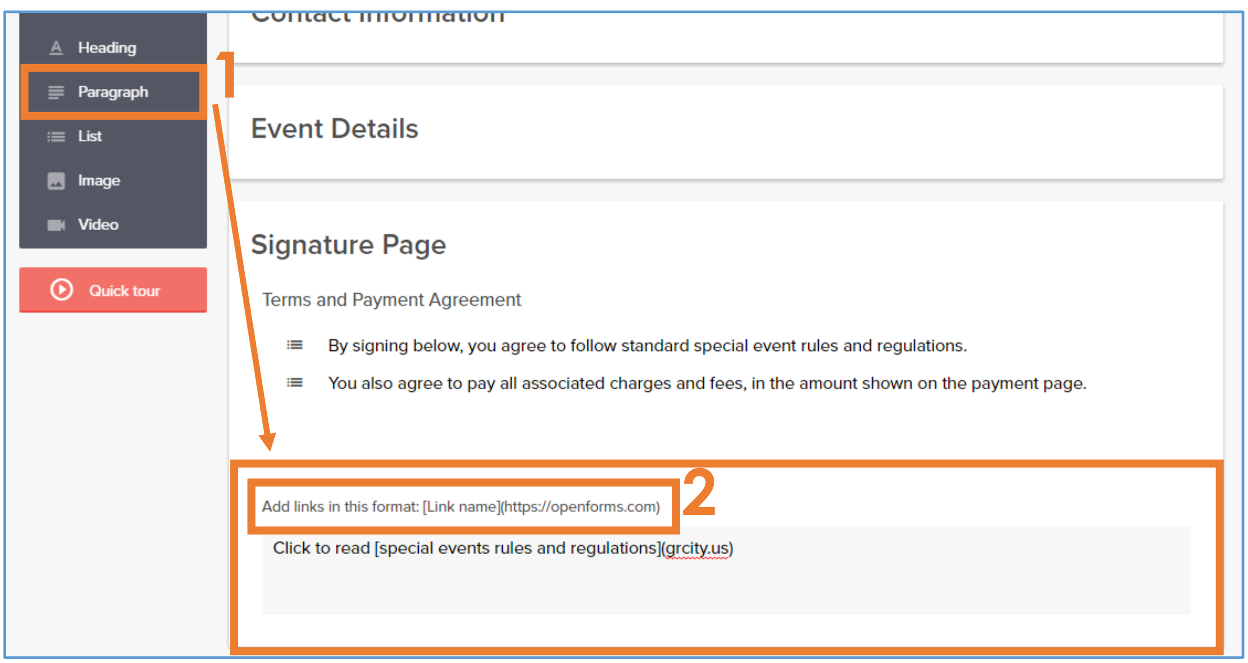
OpenForms allows customers to sign forms indicating agreement to the terms of your service/transaction. The customer signs using either their mouse/cursor on a computer or their finger on a touchscreen device.

These signatures are widely accepted as valid under Michigan law. If you are questioning whether your service type can accept these electronic signatures, contact the GR Digital Team for guidance.

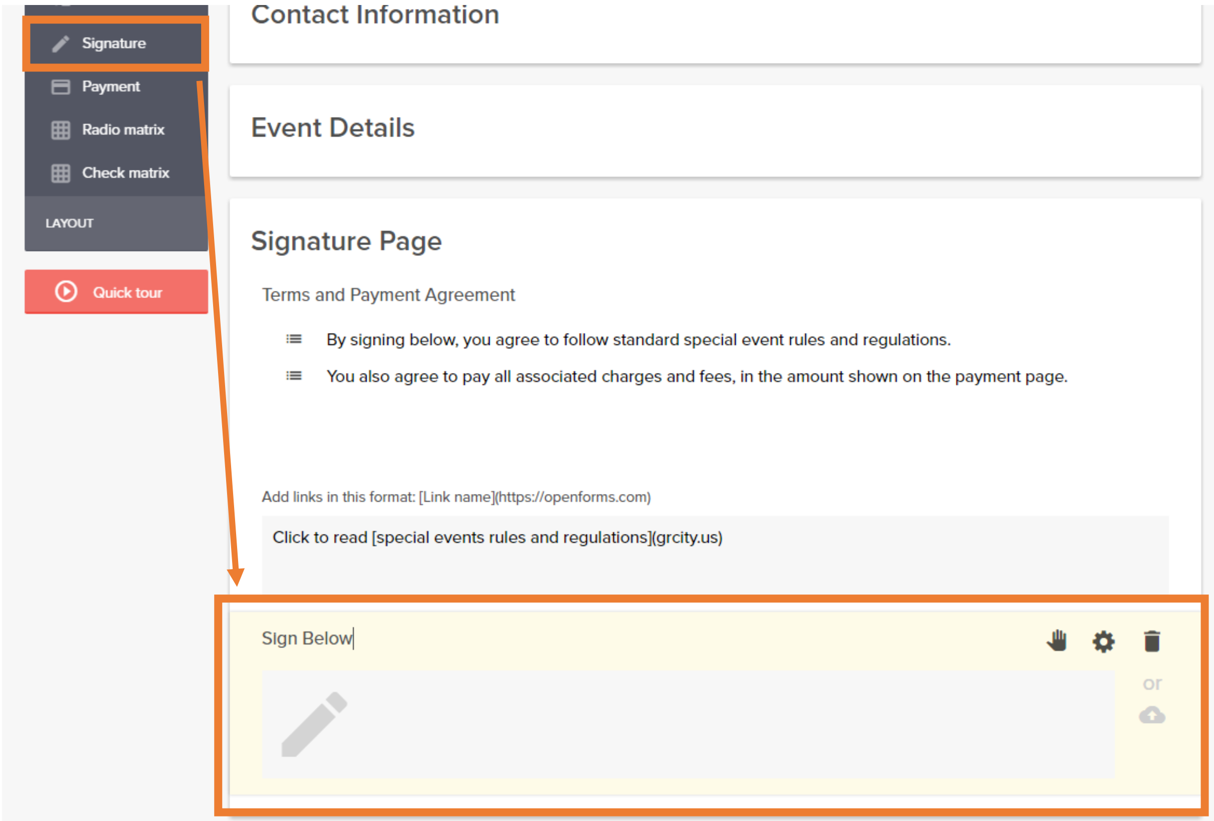
Create a signature page section and add a **PARAGRAPH** or **LIST** field to enter the terms and charges the customer is agreeing to follow and pay.



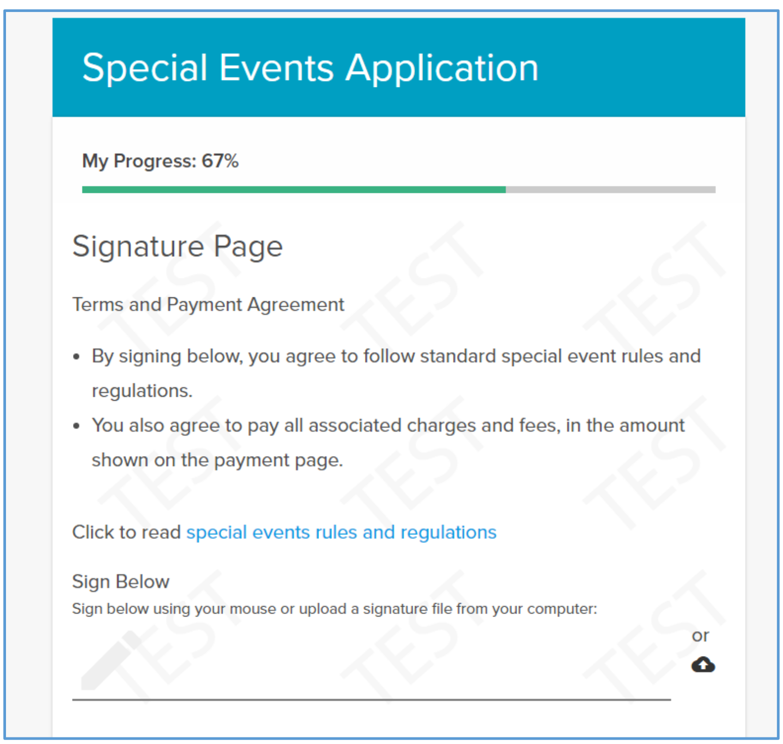
Enter the terms of the agreement and payment. The list field is useful here because you can separate each part of the agreement into more readable pieces. It's a good idea to include a **PARAGRAPH FIELD (1)** with a link to your service/transaction's standard terms so that the customer can review these before signing. The paragraph field includes **INSTRUCTIONS (2)** for adding hyperlinks.



Now it is time to add the **SIGNATURE FIELD** to collect the customer's signature. Change the question title to *Sign Below*.



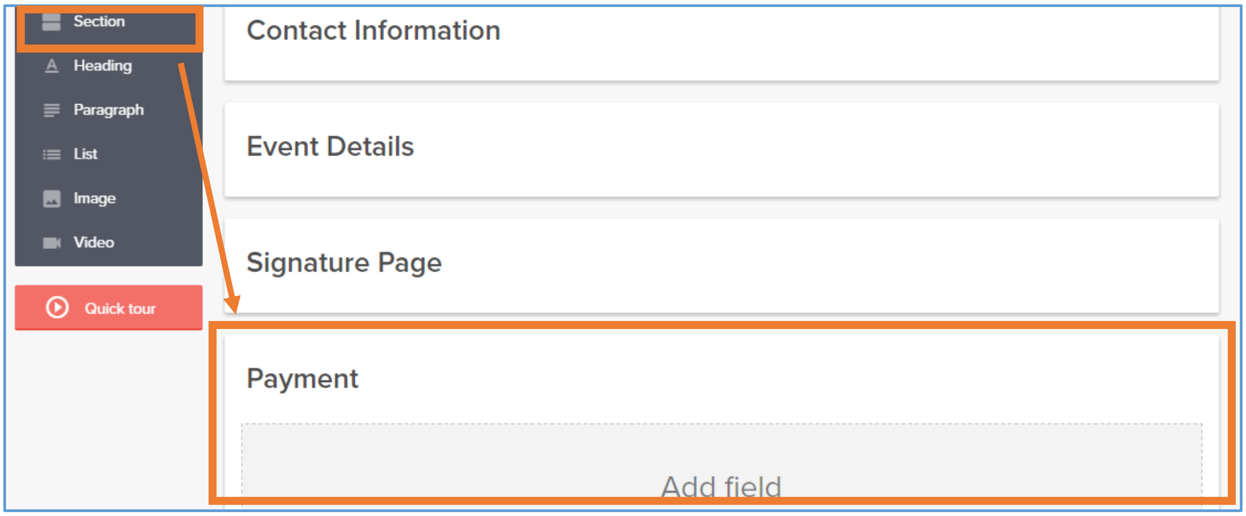
This is what customers see when they get to this section.



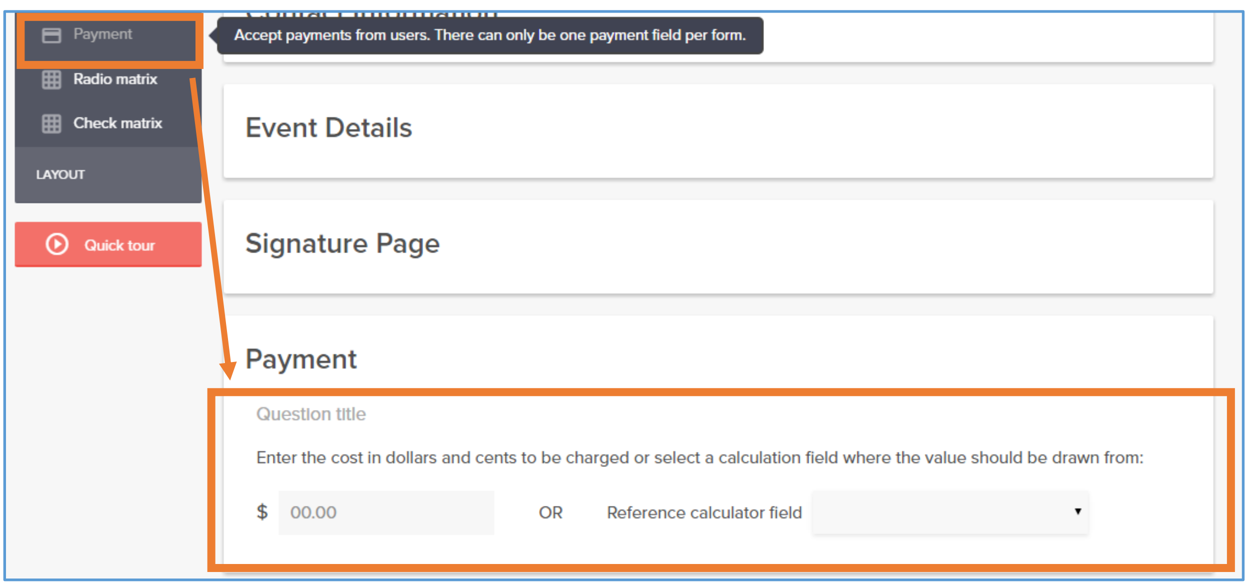
CALCULATING AND ACCEPTING PAYMENT

Some services require payments. OpenForms has the ability to calculate total costs based on either number fields that the customer has completed or flat costs for a service. Calculated fields can also add taxes and/or fees. If your service requires payment, this should be the last section of your form.

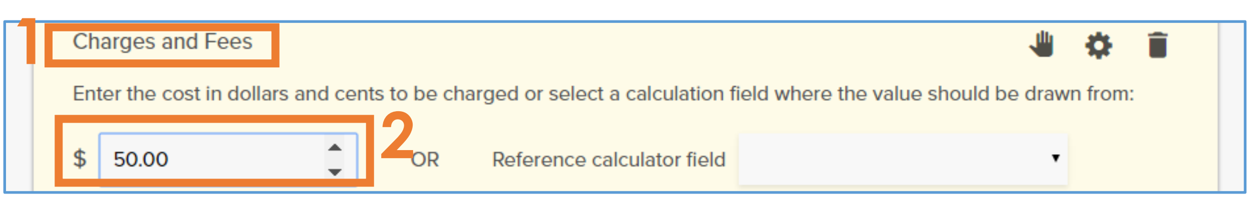
Add a new **SECTION** and title it *Payment*.



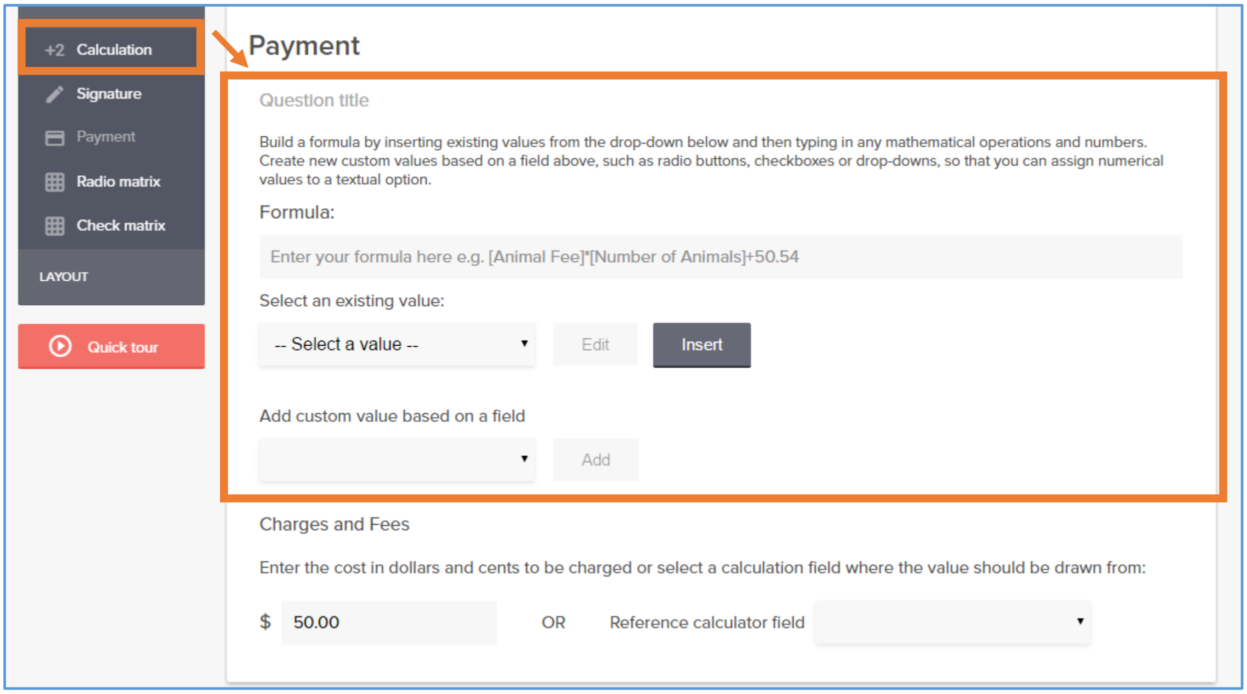
Some services have a fixed rate with no variation based on customer choices. In this case, all we need is a **PAYMENT FIELD** to charge the customer the fixed price of our service/transaction.



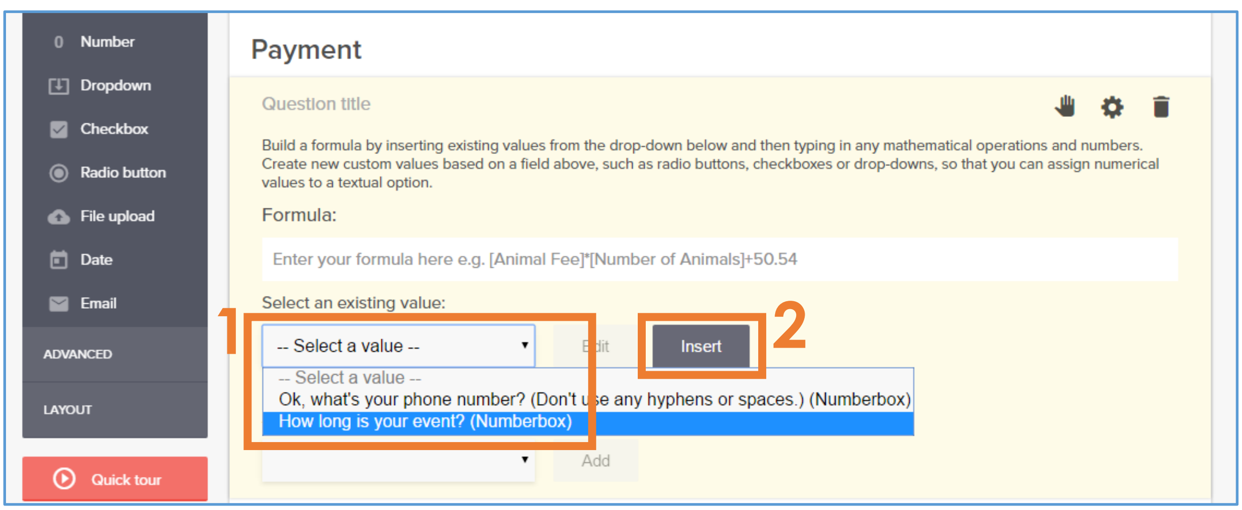
Change the **QUESTION TITLE (1)** and **COST (2)** in the payment field.



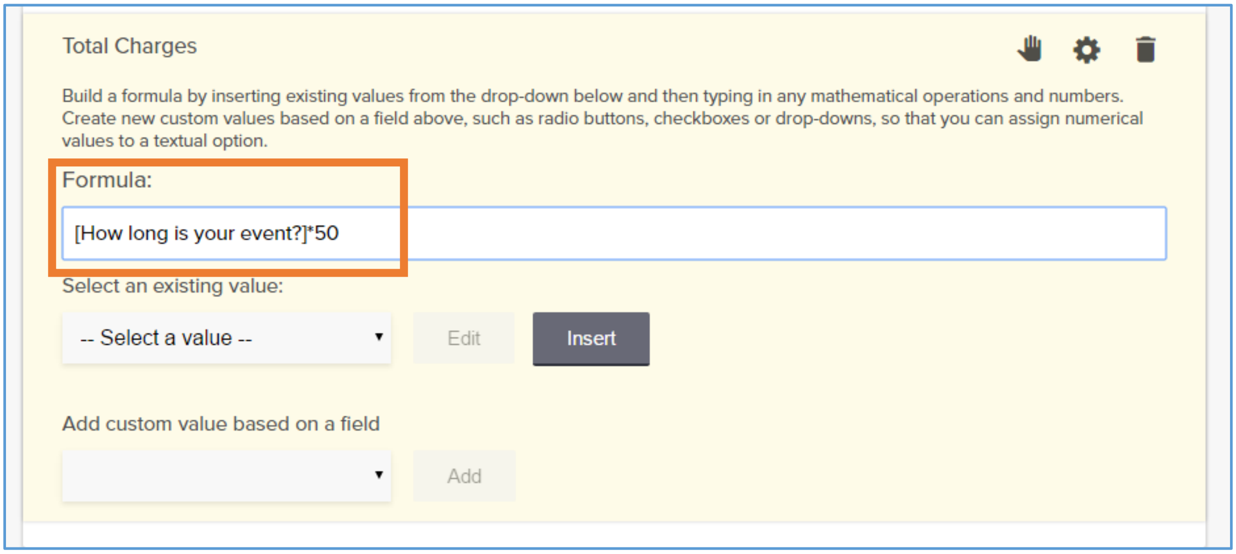
Other services will have several possible charges based on options that the customer chooses. In this case, you will need to add a **CALCULATION FIELD** in addition to a payment field.



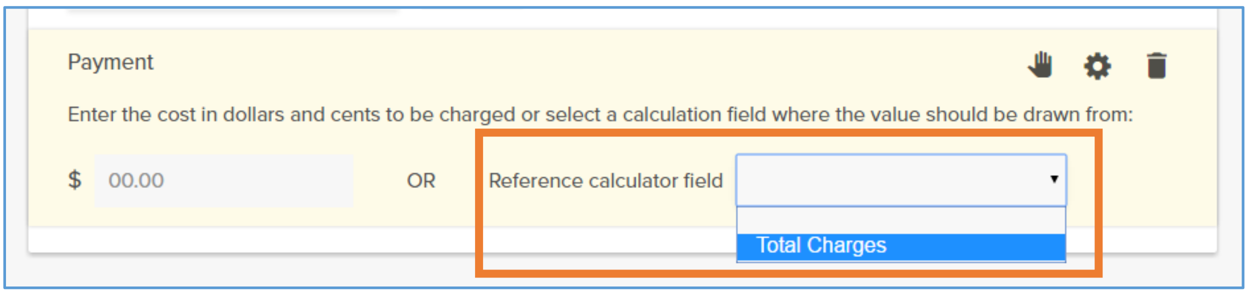
In this example, we are using a made up formula for calculating the cost of a special event. We will use the length of the event (number of hours) multiplied by a standard rate per hour. Insert the *How long is your event?* Field using the **SELECT A VALUE INPUT (1)**. Click **INSERT (2)** to add this to the Formula.



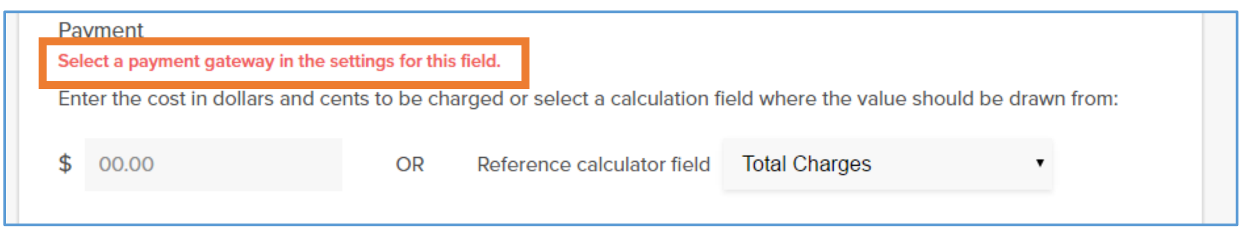
Now, in this example, we multiply the number of hours that the customer enters by the cost per hour in the **FORMULA** field. For this example, we will use a rate of $50 per hour.



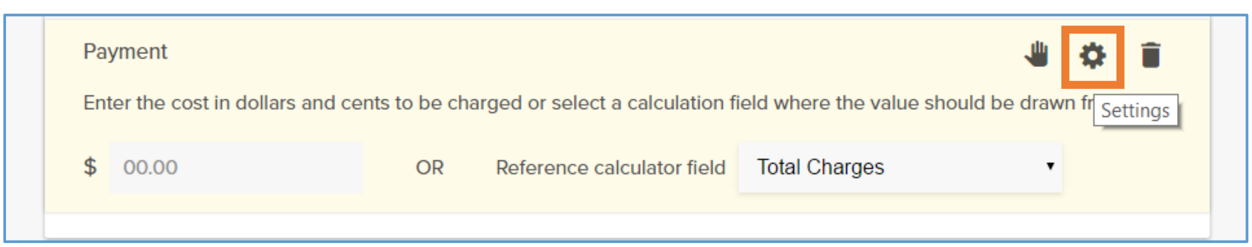
Now, select the **REFERENCE CALCULATOR FIELD** from the dropdown menu in the payment field below the calculated field. Now the customer is charged what is calculated from their selections in the form.



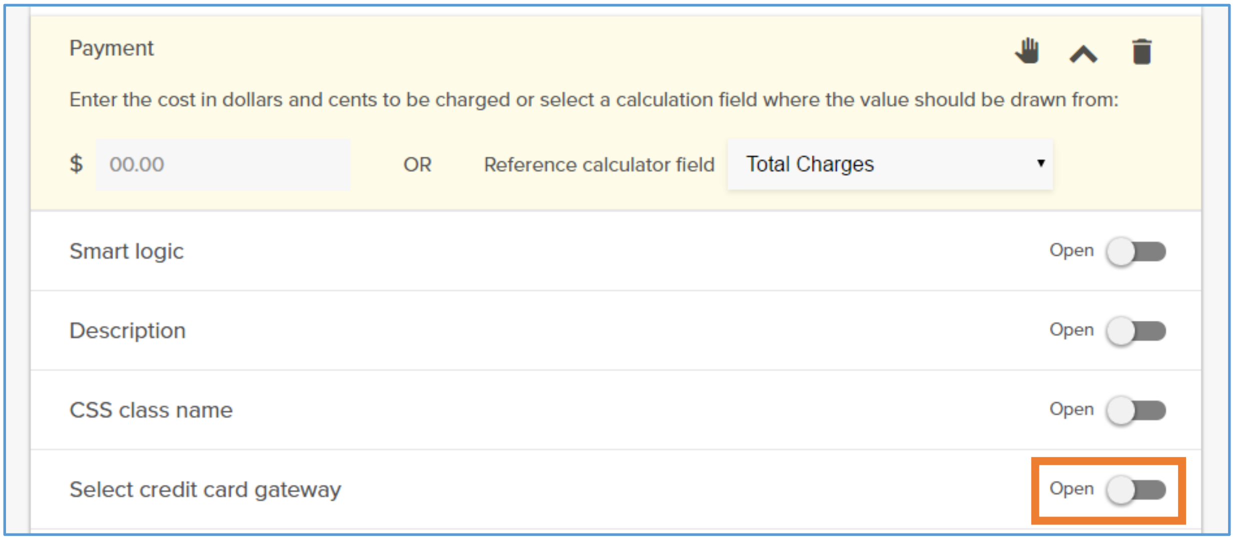
In this final step for accepting payment, we connect the City's payment gateway to the form. Without this step your form can't actually accept payment. Your form **WILL NOT ALLOW YOU TO SAVE** without connecting the gateway.



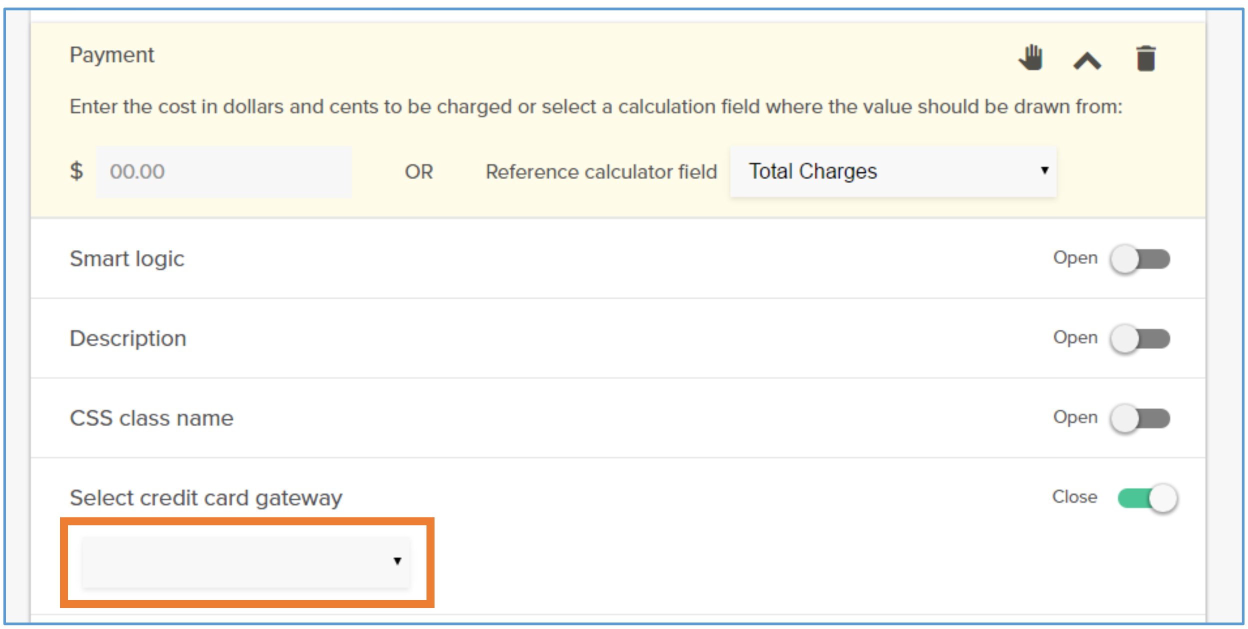
First, click on the **SETTINGS ICON** for the payment field.



Click the **OPEN SLIDER BUTTON** on the Select credit card gateway settings item.



Select the City's payment gateway from the **DROPDOWN MENU**. After you save your form, it's now complete and ready to accept payment for your service/transaction!



A FINAL NOTE

OpenForms is a tool that can create very complex forms for a variety of uses. If you are struggling with building a complex form, don't assume that it can't be done. Contact the GR Digital Team for guidance and suggestions.

OPENFORM: EDITING A FORM

ITERATE. THEN ITERATE AGAIN.

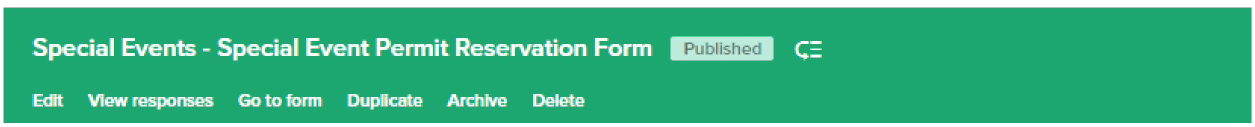
Now that your form has been out there and you've gotten feedback from customers, there are probably some changes to make.

Jumping into the form to make edits seems like the right thing to do to make changes on the fly. This is not best practice! The reason is that the form will break whenever you click *Save*. That means anyone working on the form or any saved forms will lose data.

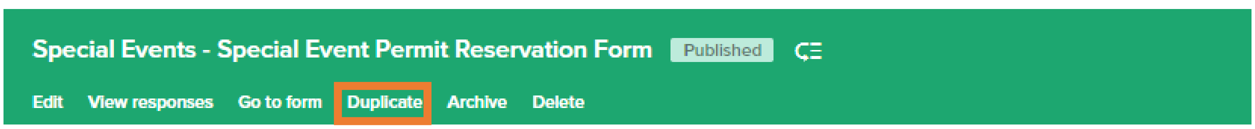
Your first step, then, is to duplicate your form. Follow the instructions below to make changes to your form.

DUPLICATE YOUR FORM

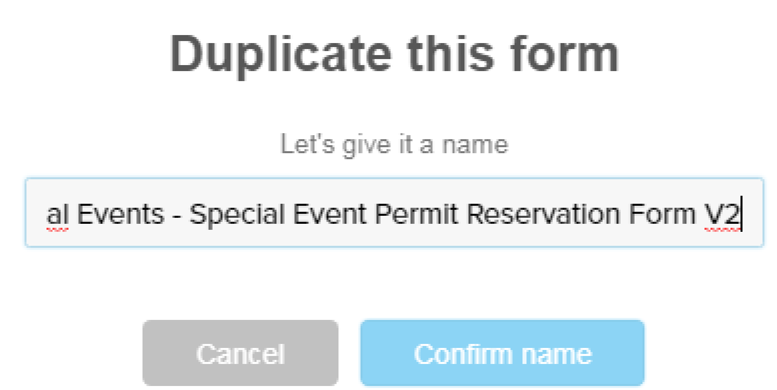
Log in to OpenForms and find your form



Hover over the form and click *Duplicate*



Name the duplicate form. Use the original form's exact naming and add the version (V2, V3, V4, etc.)



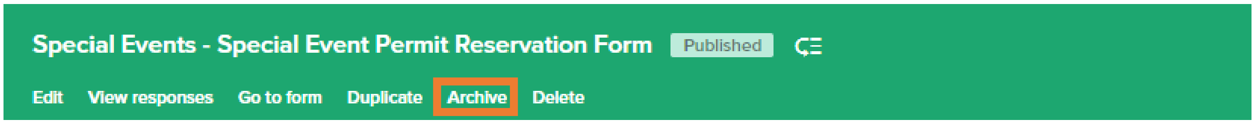
Naming convention: **ORIGINAL FORM NAME + V#**

Click *Confirm name*

ARCHIVE THE OLD

Before you jump into the new version, hover over the original/previous version of the form again

Click *Archive*. This declutters the forms listing and limits confusion

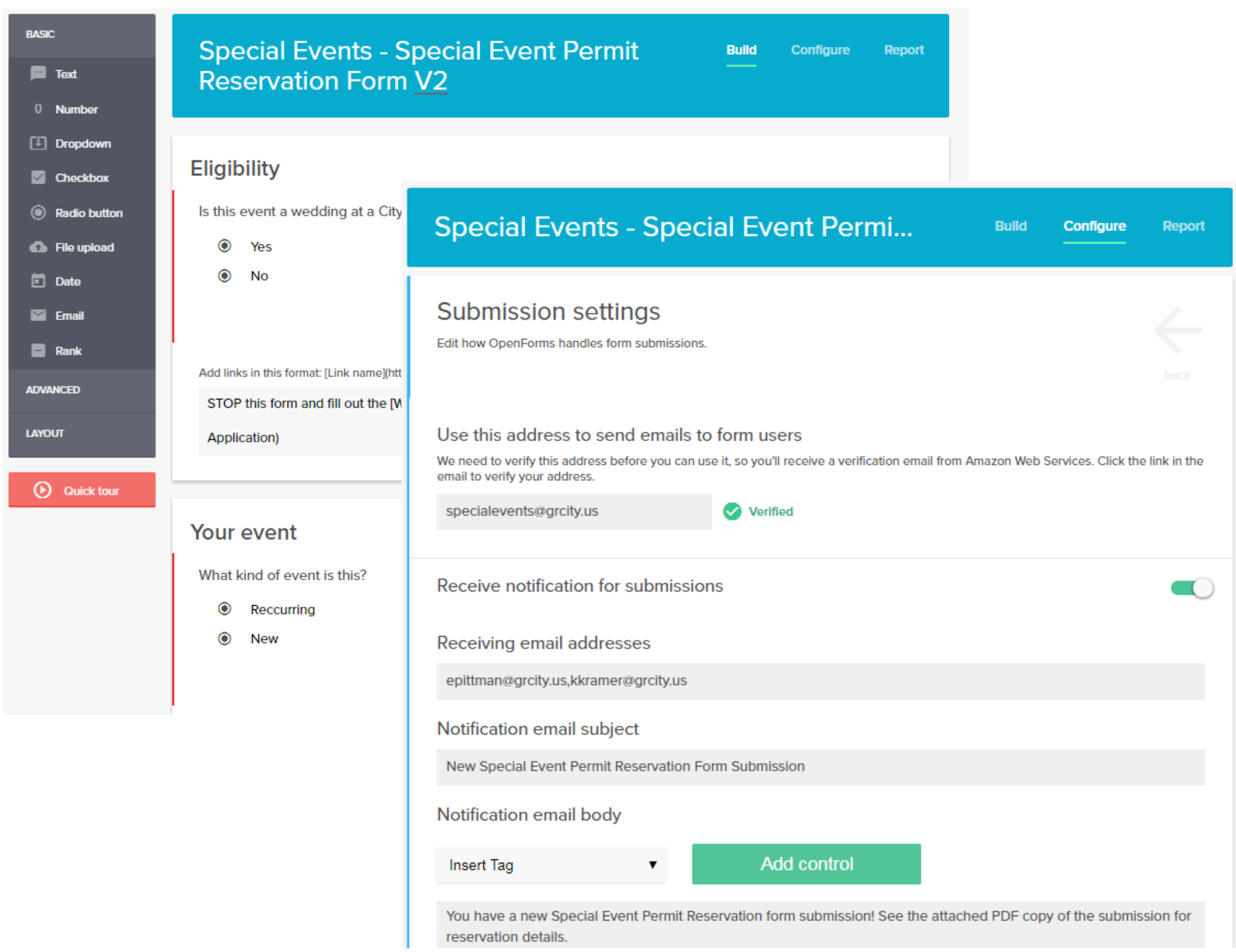


IN WITH THE NEW!

Now starts the fun of editing the form. Keep in mind that whenever you make changes, we need to test the form again to make sure the content displays correctly and the SmartLogic functions as intended.

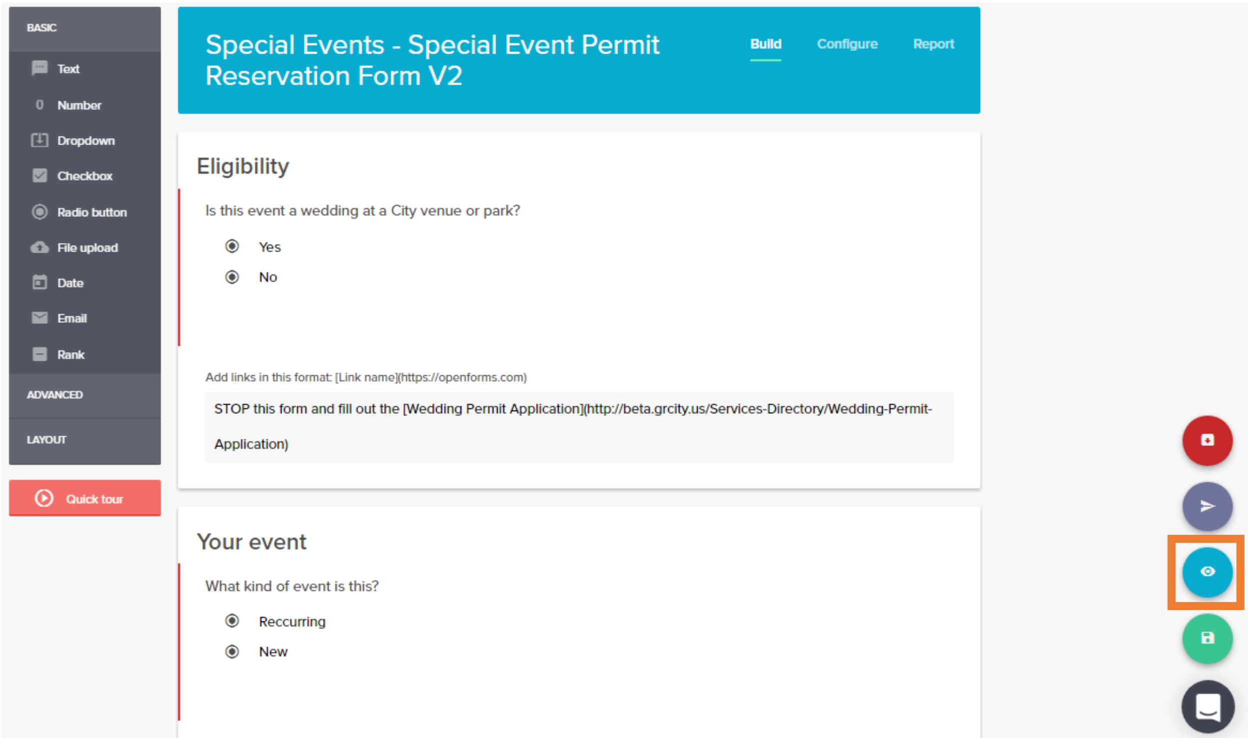
Need to add payment or have a tricky calculation? Let's talk about it! The GR Digital team is here to bounce ideas off of and to set you up for success.

OK, now go to the duplicate form you just created. You'll see that not only is content duplicated, but all the settings are too! This means you don't have to recreate submission confirmation notifications or emails, hooray!

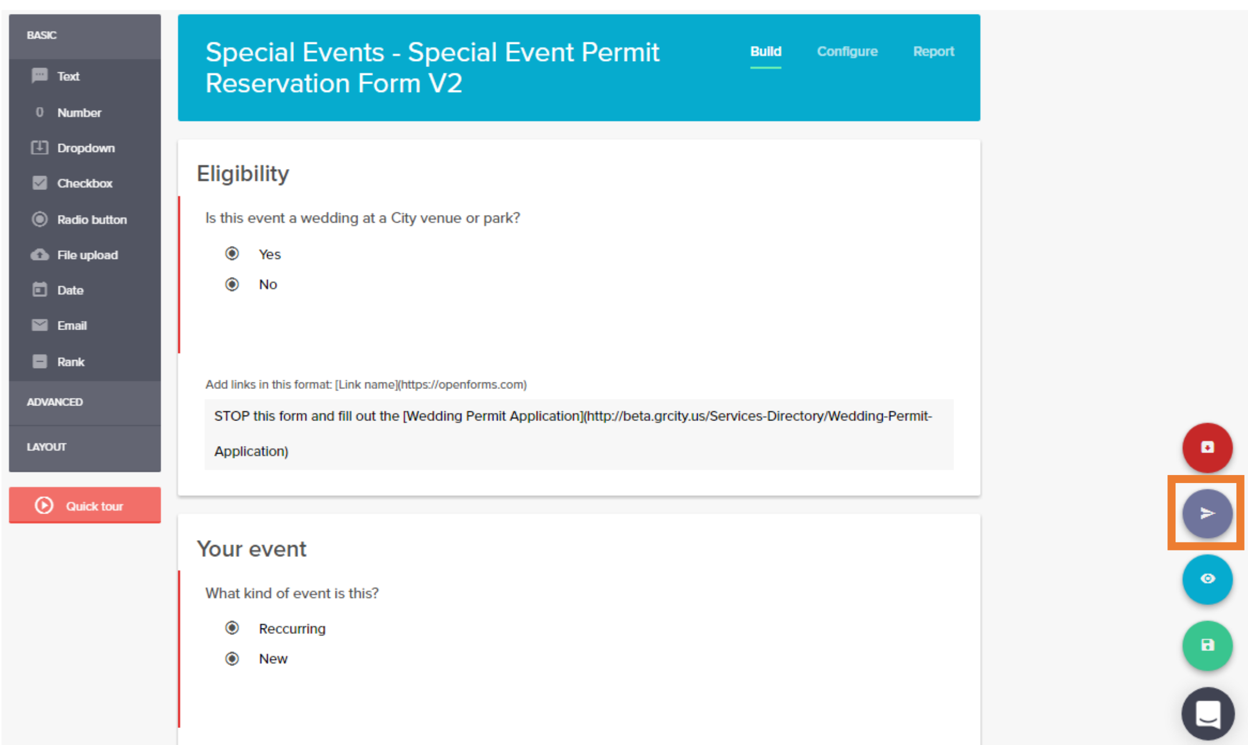


Make any changes. Follow the same processes for the various form field types as you did when you first created the form (or reference the manual if you didn't). Remember to save often!

Click the blue *Save and preview* button to test the form



Once you've tested the form successfully, click the purple *Publish* button



Copy the form link and send to GR Digital. We'll test it and replace the old link on the website with your new one.